

# A guide to effective case studies

Telling your project's story and showing its impact

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## 1. ABOUT THIS GUIDE

This guide will help you bring together what you have learned about a project or activity in a structured, clear and thorough way, so that you can communicate helpful insights to other practitioners, funders, researchers and the communities you work with.

This guide will introduce you to practice case study evidence – what it is, its uses and limitations. It will show you how to put together a case study of your project or activity quickly and transparently, and how to share it with others.



### You'll find this guide useful if you:

- » Are part of a small charity, social enterprise or community group, and want to tell the story of your activities in a clear and accessible way
- » Are responsible for reporting to funders, directors, or external stakeholders,
- » Want to share your learning within your organisation, including with staff, volunteers and the people who benefit from your projects, and help wider audiences learn from your experiences
- » Are putting together evidence for a business case, funding application, or strategy.



**If you're a funder...** You'll find this guide useful if you want to support your funded projects to share their learning, and recommend an approach to bring together their findings in a structured and pragmatic way.



### This guide includes:

- » An introduction to case study evidence, its uses and limitations
- » A step-by-step guide to put together a great case study of your project or activity
- » A template to gather your data in a consistent and transparent way

## 2. WHAT DO WE MEAN BY CASE STUDY?

The term 'case study' can mean different things for different people, but in this case we use it to mean the

- detailed description of a practice-based activity or project,
- including how the activity was developed and implemented,
- and the learning that emerges from the project.

In particular this type of practice-based case study captures the experience and learning of the people involved in the project (running it or taking part) in a structured way.



Case study here does not refer to academic case studies (which are based on in-depth research), or case studies of individuals who take part in an activity. It means the description of the activity or project as a whole, told in the words of the people involved in making it happen.

## 3. WHY ARE CASE STUDIES IMPORTANT?

Practice-based case study evidence is an important source of learning about how activities work in real-world settings. They can be used alongside other research to learn more about both what works and how or why different activities make a difference.



### Case studies offer:

- » Rich descriptions of a project or activity in its real-world context, its complexity, and the multiple people and factors involved
- » A summary of successes, challenges and learning, including any unexpected consequences
- » A communication tool to share and support learning to similar project organisers
- » A way of sharing key information on a project to a wide audience, in an accessible and relevant format.



**If you're a funder or academic...** Practice-based case studies offer rich evidence of how and why interventions work in real world settings. When collected in a consistent way, a group of case studies can be analysed together and synthesised for shared learning.

Good practice-based case studies help funders and academics access valuable learning about grassroots community wellbeing projects. This sort of learning is often under-reported or hidden.

Our **Community Wellbeing Case Study Synthesis** report looked at some of these community wellbeing case studies. If you're planning to carry out a synthesis of case studies, our **Guide to Synthesis of Case Study Evidence** can help you plan your approach.

Case studies written by practitioners provide valuable evidence to understand how projects and activities can make a difference to people's lives. Because they are carried out by people with close knowledge of the context and the people involved, they can often be more useful for other practitioners and funders to learn key project insights than other types of evidence.

Practice based case studies also have limitations which you should bear in mind when developing or reading one:

- Case studies provide a description of a particular project in a particular context. This means that we can't generalise from that project whether something will work everywhere else or in other contexts. By looking at a body of case studies together, as in our Community Wellbeing Case Study Synthesis, we can be more confident about key ingredients of success across projects. But we still need other research to test and back up those findings before we can say that something will work in other contexts and settings.
- If they do not contain evidence from an evaluation, then they are often limited about how much they can say with confidence that a project had an impact. If you want to learn how to design and run a wellbeing evaluation, you'll find advice on our online guide.



## Case studies are particularly useful because:

1. **They provide information and insights into complex real world situations and circumstances.** They do this by providing 'thick' descriptions. These are a way of describing a situation that looks beyond the observable facts, and presents details, contexts and interpretation of those facts by people closely involved in the action. Often academic studies can say if a project had an impact, or look at a number of outcomes. But practice case studies can go beyond that to explain the complexity involved in the project, and suggest the mechanisms of change – the 'why' and 'how' activities made a difference; as well as the factors that may have limited or amplified the impact.
2. **They come from a practitioner perspective, so are useful for practitioners.** Since the people who put together the case studies are closely involved in the activity, they bring the views, concerns and expertise of people with experience of the project. This can make them more useful than other evidence for understanding how a project can be implemented, including what barriers may be faced, or what key ingredients are involved in putting the activity into practice
3. **They are a great way to share complex stories in an accessible form.** Unlike academic studies, which may be written in technical language or not readily available, practice-based case studies can be easily understood by practitioners, policy makers and funders. They can be a valuable tool for charities and community groups to tell their stories in a clear and compelling way.
4. **They are a pragmatic and cost-effective way to gather insights.** Unlike formal project evaluations or academic studies, project case studies can be a relatively quick and low-resource way to bring key learning from a project together. They allow community groups and small charities to share important knowledge about an activity in a proportional way. For community wellbeing projects, doing a case study can be a way of involving volunteers and participants in telling their story. If case studies are compiled in a structured way they also allow academic researchers and funders to look across a body of practice evidence to gain even more insight.



**If you're a policy maker or funder...** A collection of case studies is especially valuable because it gives us a rich picture of how similar activities work in different contexts – or how different activities achieve similar outcomes. Looking at a body of case studies together can help us decide whether or how activities can be rolled out, or adapted to different contexts.

The key to getting meaningful insights from a collection of case studies is making sure they are developed in a structured way. You can find out more about commissioning case studies in our [blog](#).

## 4. WHAT MAKES A GOOD CASE STUDY?

Practice case studies can be very different from each other, depending on the project they deal with, the data they include, and the people involved.

However, there are six key features that make up a good case study:

1. **A description of the context of the project or activity,** including the population, geographical area, and organisations involved; as well as any major changes or events that happened during the course of the project. You should include how the project was developed and why.
2. **A description of what happened, and the activity or intervention that took place.**
3. **A clear methodology, describing how the case study was carried out.** This should include when, how and why data was collected and analysed and who by – as well as any limitations of the data. If you have a formal evaluation of the project you should summarise how it was carried out.
4. **A clear description of the findings.** This includes the outcomes and impacts that the project had on individuals, communities and organisations involved. These findings can also relate to the process by which the activity was run, as well as challenges that were encountered and how they were addressed. This description should include your interpretation of the findings, including when they were unexpected or negative.
5. **Well presented 'thick' description that allows the reader to fully understand what happened.** Case studies should also explain any technical language or terms that are not familiar to a general audience. You can find more information about what we mean by 'thick' description in the step by step section of the guide.
6. **It should be clear about who wrote the report,** the sponsors or funders of the project, any conflicts of interest or other relevant data. Being transparent about this is crucial to ensure the evidence is trustworthy and useful to others.

## 5. PUTTING TOGETHER YOUR PROJECT CASE STUDY



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Follow these steps to put together a great project case study:

-  **1. Think about your reason for putting together a case study.**  
Is it to explain how a new idea worked in practice, or to summarise the history of a project as it developed over time? When in the project's lifetime are you writing the case study, and how does that affect what you're able to include?
-  **2. Decide who will write the case study.**  
This should be someone who is familiar with the project - like a project manager - and who can look at the project findings as a whole. This person should know key information about the project, and have collected or have access to learnings.
-  **3. Collect and compile the data.**  
This step will be different for different projects, but you should include any findings you have from evaluations, observations or feedback, as well as learnings about the process of carrying out the project. Lay everything you have out in one place before putting your case study together, and make sure you're clear about what the findings mean.  
 **It's very important that the case study preserves people's anonymity and confidential information. Be careful that the descriptions aren't so detailed that they inappropriately reveal personal or sensitive information. You should get consent from people to include their stories in the case study, and let them know the case studies may be used for future study.**
-  **4. Include negative or controversial findings.**  
There are very few projects which just have positive or uncomplicated outcomes. Most of the time your activities will result in a mix of positive, negative and unclear impacts on the people who attend. It's important to include everything you learned, even if it was negative or unexpected. Learning from what didn't work is just as useful as learning from what did.  
 **Watch out though: case studies can also be more selective in what they report than other types of research, since they are written by people who are very close to the project. A single case study should not be used to make decisions about whether or how to implement a project. Instead funders or practitioners should look at a collection of case studies, alongside more formal research or evaluations to get a fuller picture of the activity in question.**
-  **5. Involve insights from different people.**  
A good case study will include learning from staff, volunteers and participants, who all have different insights into the activity. You should also check with different people, once you have put together the case study, to see if it makes sense and if there is anything they could add to it. When you write up the case study, be clear about who was involved.



-  6. **Use a template to write your case study.**  
In order to ensure your case study is complete, reliable and clear, we recommend that you use a template. The template at the end of this guide is set out to make sure you include all the key information in a way that's thorough, transparent, and easy for funders and other audiences to understand. Writing up your case study in a structured way helps other audiences understand the whole story and be able to access significant information easily.
-  7. **Add 'thick' description.**  
Don't forget to include the details that show the context of the project, and your interpretation of how and why something happened (based on your knowledge of the factors involved).
-  8. **Be clear about the limitations of your findings.**  
You should be transparent about how you gathered your findings, and what you think might be the limitations of the data. For example, if you used a feedback survey which only a handful of the participants answered, you should make that clear. Your evidence is stronger and more trustworthy the more transparent you are.
-  9. **Include quotes, photos, numbers and links.**  
Although the main focus of the case study should be the description of the activity and your findings, you could add these other types of content to bring the narrative to life. Make sure to link to your website or other information about the project so readers can follow up if they want.

 **When case studies are used primarily for promotional purposes they can be less reliable. Case studies should include both positive and negative findings, and be transparent about how the data was collected and why.**
-  10. **Share your findings as far as is possible.**  
When you're happy with your case study make sure you share it with others in your organisation, the people who took part in the project, funders, and your peers. If you feel like the contents are too sensitive to share publicly, you should still show them to the key decision makers involved – usually your board of trustees and your funders.



## What's the difference between 'thin' and 'thick' description?

You may not have heard of these terms before, but it's likely that you know what they look like when you see them on paper.

A **'thin'** description is factually accurate, but lacks context or detail to explain the significance of the facts.

An example of 'thin' description would be:

"A total of 15 older women attended the start of the 6-week exercise class, but by the end 5 had dropped out."

A **'thick'** description doesn't just describe what happened, but also says what the context was, and tries to explain the significance of the facts.

The 'thick' description of the same facts might look like this instead:

"The project attracted a lot of interest from mainly retired older women who wanted to improve their fitness for a number of reasons, such as because they were referred by their GP, or because they were struggling to play with their grandchildren. The 15-strong group started positively, with most of the women reporting that they were looking forward to feeling better after exercise. However, over the 6-week course, five women decided to stop attending the classes. Three of them had moved onto lighter exercise that was easier on their joints, and the others could not be contacted for feedback. It's possible that they felt that they weren't keeping up with the others, as they had reported this to the instructor earlier in the course."



You can find examples of the case studies we collected with Locality as part of this project [here](#).

If you want to continue to understand your impact on wellbeing, there is plenty of guidance on our site.

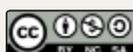
- Our online [Guide to Measuring your Wellbeing Impact](#) can help you plan and carry out a wellbeing evaluation.
- Our Brief Guide to Measuring Loneliness can help you understand this important aspect of wellbeing and your effect on the loneliness of people you work with.
- Our extensive evidence base of what can improve wellbeing in community settings can help you plan your activities and understand your impact through:
  - » [Volunteering](#)
  - » [Places and community](#)
  - » [Culture, arts and sport](#)



This guide was written by Ingrid Abreu Scherer and builds on the work of South, J. et al, and colleagues from Locality.

South, J., Southby, K., Freeman, C., Bagnall, AM., Pennington, A., Corcoran, R. (2021) Community Wellbeing Case Study Synthesis. What Works Centre for Wellbeing.

In partnership with



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# PROJECT CASE STUDY TEMPLATE

Use this template to put together a case study that is thorough, transparent, and easy to read. There are 15 questions, each with sub-questions for guidance. Word limits are for guidance only, please write more or less as appropriate.



Download an editable template to complete your case study from our website

## 1. Name of your organisation

Add any links to your website or social media

## 2. Your name and role in the project

Add a contact email or phone number (this will not be published)

## 3. What is the title of the project? (50 words)

## 4. Overview (150 words)

Summarise the case study in no more than 3 sentences. This may be used in a stand-alone form to describe the project and readers will be able to link to the rest of the case study.

## 5. Setting (150 words)

Give a brief description of the area where the project occurred, a brief description of the organisation/s involved in running the project.

## 6. Purpose of project (150 words)

What was the purpose of the project? What is the challenge or problem the project has tried to address? What are the stated aims, goals, or objectives of the project?

## 7. Description of the project (200 words)

Briefly describe what the project is and/or what it does.

When did the project begin and when did/will it end? Where did it take place? Who was involved in the project (staff, volunteers, partners)?

What funding has the project received? Does the project rely on any other resources, such as staff from other organisations or premises owned/managed by other organisations?

## 8. Why was this approach taken? (100 words)

Why was the project set up this way? Did you draw on any evidence or theory-of-change when setting up the project? What other reasons did you have for designing and running the project in the way you did?

## 9. Who took part? (150 words)

Indicate the number of people who took part in the project and any demographic information on participants (i.e. gender, ethnicity, age, disability). Describe how they came to join the project (referrals, word-of-mouth, existing relationship with them), and what you know about their motives for taking part.

## 10. How was data collected for this case study? (100 words)

Has the project been evaluated? If so, how? What data was collected and by whom (i.e. by you/your organisation, external consultants, academics)?

## 11. Project impact and outcomes (300 words)

Has anything changed as a result of the project? What impact has the project had on participants, the wider community, and your organisation? Have you produced anything as a result of the project (i.e. reports, guidance, etc)? Were there any unexpected outcomes? Were there any negative outcomes?

## 12. Enablers and barriers (300 words)

What factors have supported the project and any positive outcomes? What factors prevented the project from being more successful? Examples might be amount and length of funding, staff skills, availability of volunteers, enthusiasm of participants, weather, scheduling or pandemics!

## 13. Key learning (100 words)

What is the most important thing you learned from this project? What key advice can you give to others starting a similar project?

## 14. Next steps and sustainability (100 words)

How sustainable is the project? Could the project continue? What are the plans for the project in the future and what is needed for this to happen?

## 15. Further information (100 words)

Include any titles/links to further supporting material about the project (i.e. website, evaluation report). Include contact details of anyone who would be willing to share learning from the project with others starting similar projects.

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