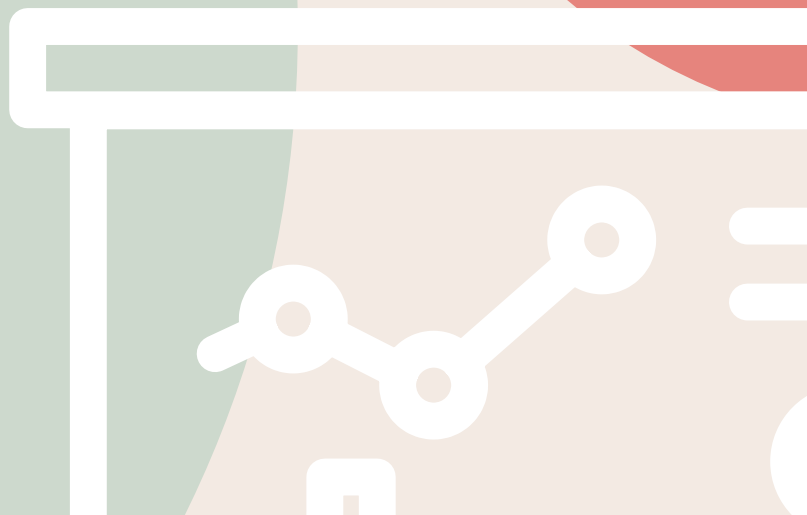
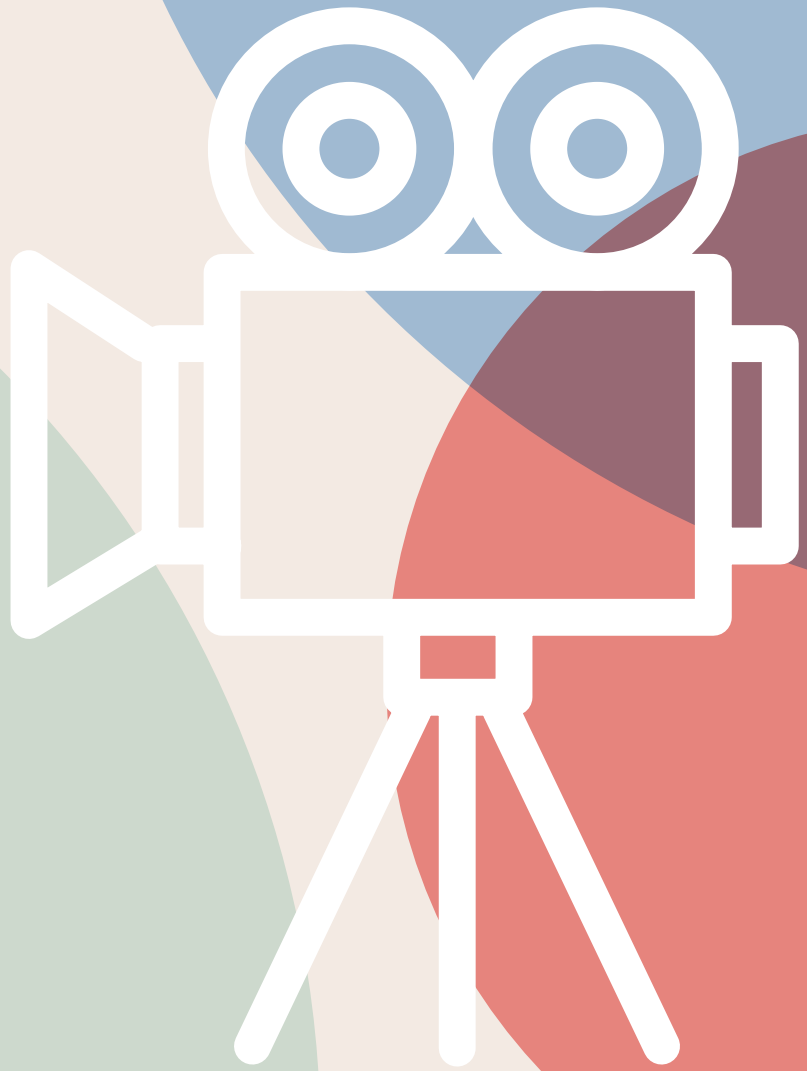




How To Create Great Case Studies

A toolkit for sharing useful stories about your practice



Introduction

Introducing the case studies toolkit

Meaningful case studies can be a great tool to support staff to communicate about their practice, describe what works, identify and explore challenges and successes. They can be really useful reflective practice tools and guide important discussions in team meetings, supervision, orientation and training.

Case studies provide valuable evidence for quality audits, funding applications, internal and external reports. As the service delivery environment changes, case studies are also becoming an increasingly important tool to communicate with potential clients and carers.

While there are many applications of case studies,

staff often find it challenging to find time to create and use case studies.

This toolkit is designed to support staff to create engaging and valuable case studies and apply them in their practice. It includes information and tools that can guide you through the fundamentals of creating case studies that are engaging, meaningful and useful. This includes:

- Understanding the value of case studies
- Creating case studies that are useful for your target audience
- Different ways to present case studies
- Making the most of the case studies you create.

Introduction

Background

What are case studies

Case studies explain and analyse a ‘real life’ situation. Typically, they tell a story, from one or more people’s point of view, to describe what happened, analyse the circumstances and outcomes. As they are presented in context, case studies provide a valuable opportunity to explore the range of factors that contributed to achieving the outcome.¹ This can generate discussion, demonstrate theory in practice and support ongoing learning.^{2,3,4}

A great case study should do more than just describe a situation. It should include an analysis of the situation and a clear message which makes the information meaningful and useful to your audience. This is described as a ‘call to action’. It may focus on what you have learned from the case, what others can learn or how the case can be used to inform practice moving forward.⁵

Health, aged care and community services, researchers and policy makers commonly use case

studies to explain, investigate and inform their work. Case studies may focus on:

- People’s experiences, perceptions or feelings (focus on how it felt)
- Events, interventions, actions or interactions (focus on what happened)
- Client pathways or specific elements of care (focus on how you interacted)
- The use of specific tools, approaches, processes or systems (focus on how it happened)
- How theory, policy or good practice is applied in different organisations or teams (focus on application / implementation)
- Common practice (focus on what happens day to day) or unusual / extraordinary cases, events or outcomes (focus on what made something different)
- A new or different way of working or an emerging pattern (focus on what’s changed).^{1,6,7}

The “case” is the ‘real life’ situation. The “case study” is the analysis of the situation.⁸

A range of language is used to describe case studies, including client stories, case reports, case presentations, case histories. For the purpose of this toolkit, we will use the term case studies. Within a case study, the word ‘case’ can be used to describe a person, interaction, practice, event, organisation

or phenomena. The common theme is that each case is set in a real world context. We will focus on case studies that describe interactions with clients (client stories), service innovations and organisational practice.

Introduction

Background

How can case studies support you in your practice

Case studies are often used to support discussions within teams (eg case conferencing) or to share good news stories (eg within a quality report). There are however, lots of different ways case studies can be used and shared. Great case studies can be used to:

- Educate or inform people about the way you work (eg potential consumers, new and existing staff, internal and external stakeholders)
 - Understand how and why an approach works differently for different people or in different situations (eg creating a number of case studies that describe different clients' attitudes and experience of working with your team or variable client outcomes)
 - Demonstrate good practice (eg effectiveness and impact of service provision) and the implementation of particular approaches
- (eg wellness and reablement, diversity planning and practice)
 - Highlight and explore innovations, enablers and challenges
 - Promote your services / organisation (eg to consumers and potential staff)
 - Advocate for ongoing support or funding
 - Provide evidence (eg to answer research questions, test hypotheses or demonstrate achievements, values or alignment with quality standards)
 - Use client voices to inform ongoing quality improvement and service improvement (ie as part of a broader consumer engagement strategy).^{6 8 9 10}
11 12 13 14 15 16 17 18

Case studies can be a compelling way to bring statistics to life and break down complex ideas / information into easy to understand stories.

Examples of questions a case study could be helpful to explore

- How and why has a new social support group format been beneficial for participants?
- What are the dynamics of a successful (or unsuccessful) intake process?
- What does everyday practice for a home visiting podiatrist look like?

Introduction

Background

Case studies are a powerful learning tool.

An actual case brings information alive and allows people to connect with it in a different way. Case studies stimulate the imagination, fill in the gaps left by generalisations, remind us of the complexity of practice and that every situation is unique in some way.²⁰

While research and policy are important drivers for practice change, there is often a gap between theory and practice in relation to implementing quality improvement initiatives. Real transfer of learning (ie putting new learning into practice) is often a challenge. Research has found that successful implementation relies on more than just evidence.²¹ It's important for staff to connect with information, recognise its relevance, value and the difference it can make for them (and their clients). Case studies can bring theory to life, help staff put the pieces of the puzzle together and understand how to put those learnings into practice.^{17 22 23}

Case studies also help to describe and explore the complexity of situations and the range of factors

Case studies put a human face on data or information by sharing real people's experiences. This engages the audience emotionally and allows them to understand the reality of practice.

Case studies allow the audience to actively engage with the material. Therefore, they can support people to make more informed decisions, based on experiences that are relevant to their own situation.²⁵

that impact on how and why staff, clients and organisations make decisions.^{7 24}

For example, a person's decision to follow their Occupational Therapist's recommendation to use equipment to improve their safety at home, may be based on:

- The person's own understanding of their condition, function and potential risks
- The value the person places on the advice
- The person's relationship with and perception of the Occupational Therapist
- Past experience with health providers
- The cost and accessibility of the equipment
- The opinions, experiences and values of people around them.

A case study provides a valuable way to understand and explore these influences and how they impact on each person's decisions and progress their goals.

The flexibility of case studies also allows you to tailor them to meet your needs. This makes them an effective way to cover the complexity of client stories and service delivery in an engaging way.^{7 12 24}

Introduction

How to use the toolkit

The toolkit consists of guides which are designed to help you in designing and creating great case studies. You can read all the guides or simply use the guide that best suits the type of case study you are

planning. If you want more information about case studies, you will find links to other resources in each guide.

What's included in the toolkit

Introduction

The introduction sets the scene and provides the context for the toolkit. It describes the value of case studies, how and why they can be used as valuable tools to support you in your practice.

Step 1

Identify what you want to communicate and design your approach

Where to look

Guide 1: Planning your case study

Interactive tools

Case study planning tool

- Part 1: Before you start
- Part 2: Designing your approach

Step 2

Create fit-for-purpose case studies

Where to look

Guide 2: Written case studies

Guide 3: Video case studies

Guide 4: Visual case studies

Interactive tools

Case study planning tool – Written case studies

Written case study template

- Client story
- Service innovation

Step 3

Use your case study

Where to look

Guide 5: Making the most of your case study

Introduction

Resources

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Guide 1: Planning your case study

Creating useful case studies

Good planning is the key to creating great case studies. There are a range of ways to create and share case studies. Each way has advantages and disadvantages. This guide is designed to step you through the planning process and find the best way to create a case study that fits your purpose.

You can approach the planning process in a range of ways. You may have been asked to present a case study for a specific purpose (eg for a quality report or

team meeting) or you may have worked with a client that you think would be particularly useful to present.

Either way, you can work through the following steps to make sure that you're set up for success. This planning process can be done quickly and easily – it's not about spending lots of time planning, it's about clarity. As long as you can clearly answer each question, then you're on the right track and can keep moving through the steps.

How will the case study be used

Before you do anything, be clear about the story you plan to tell ... start by identifying WHY you are creating a case study.

Then describe WHO you are telling WHAT, WHEN and HOW.

WHY: Identify the purpose of your case study

Great case studies are created with a specific purpose and audience in mind. From the beginning, be clear about how the case study will be used. This will help you plan and prioritise what information is most relevant to include.^{1,2}

consider:

- How will your audience use the case study
- What difference will sharing this information make
- How will you know if you've achieved your aim?^{3,4,5}

When setting your objectives for your case study,

Guide 1: Planning your case study

Creating useful case studies

WHO: Describe your audience

Great case studies can be useful to a broad range of people. Your audience could include potential or existing clients, other members of your team, staff in other organisations, quality reviewers or a funding body. Each person or group will have different priorities. If you have multiple audiences, you may need to create multiple case studies. Be specific about who you are speaking to. Consider:

- What's important to them
- What do they already know
- What experience do they have
- What are the characteristics of your audience – consider their diversity (eg characteristics, experiences, preferences, abilities and circumstances).

For example, if you are writing a case study for:

- **Potential clients** – your audience may have preconceived ideas about your role and organisation, or may know nothing about what you do. Consider what will be an appropriate way to share information with your potential clients

(consider their age, literacy, culture, language, vision, technical proficiency etc).

- **Members of your team** – you won't need to go into detail about the context of your team, the services you deliver or your organisation. You may therefore focus more on your interaction with a specific client or the implementation of a new tool / approach. You may also include more professional language if you are speaking to staff with similar backgrounds and training.
- **Your funding body** – your audience will understand the requirements of your program and the broad context of your role, but may not have hands on experience. It may be important to provide information about the specifics of what you do and what impacts on the way you practice (eg the detail of your program, your environment and your client group). Keep in mind that they will be likely to have a different professional background, so avoid jargon. The nitty gritty details of your intervention may not be necessary or relevant.

WHAT: Determine your key message/s

Be clear about what you want to tell your audience. Be as specific as possible when defining your message.⁶⁷ Remember that for a case study to be useful, it needs to do more than just tell your audience what happened. There needs to be a call to action (ie a clear idea about what your audience can do with the information). Consider:

- What do you want your audience to learn/ understand?
- What will engage your audience? Think about what's important to them, what challenges they're experiencing and what impacts on their decision making.

- How will your audience use / apply the information?
- What do they need to know to be able to take action?

For example, does the case study prompt your staff to practice differently? Will it support consumers to make more informed decisions? Does it provide evidence to support your funding application to expand or change the way you deliver services?

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Creating useful case studies

WHEN & HOW: Determine the way to share your case study

To determine the best way to share your case study, you need to clarify the context of when and how your audience will engage with the information⁸⁹. This will also shape the way you communicate your key messages and the level of detail required. Consider:

- When will your audience engage with the case study
- What would make the case study appear useful, relevant and worth investing their time in
- What will they be thinking and feeling when they engage with your case study
- What other information will be available to them?

For example: Consider what will be happening when your audience reviews your case study. Will staff be available to answer questions or provide more details when your audience uses the case study? Are you presenting it during a face to face meeting or will it be used as a stand-alone tool?

Once you have clearly identified how the case study will be used, it should be easy to determine the:

- Information required to tell your story
- Best way to communicate this information (eg text, audio, video etc)
- Where / how to share it (eg hard copy or electronic newsletter, website, conference, annual report, team meeting, social media etc).

Understanding the best way to present your case study

Case studies can be presented in a range of formats (eg written case studies, videos, posters, slides or audio recordings). Each type of case study has advantages and disadvantages. Choosing the best way to present your case study will depend on its purpose, audience and the key messages you want to communicate. Think about:




- What will be accessible, convenient and engaging for your audience?
- What is the best way to get your message across?

- How does the case study fit with other information that you're presenting? (ie will your audience be accessing the case study as a standalone piece of information, or in the context of other resources / reports / discussion etc).
- How much information do you need to share? Consider the background or contextual information you need to provide, the level of detail and the complexity of the situation / experience.

Guide 1: Planning your case study

Creating useful case studies

Pros and cons of different case study formats

| | Pros | Cons |
|---|---|--|
| Written  | <ul style="list-style-type: none"> • Easy to save and share • Can read through and focus on sections that are most relevant • Can link to additional resources or information • Quotes and resources can easily be included from a range of sources (eg interviews, reports, consumer feedback etc) • Use quotes, images and storytelling techniques to engage the audience | <ul style="list-style-type: none"> • Less emotional impact than seeing a person telling their story • Can be difficult to engage audience • People are flooded with written information, so it can be challenging to make your case study stand out • Require English literacy and vision |
| Video  | <ul style="list-style-type: none"> • Engaging • Include body language, facial expressions and tone of voice which allow you to connect to people and communicate emotions • Provide visual evidence of the difference you made • Use graphics or visuals to demonstrate to the audience how they can apply the learnings • Can be shared on a range of platforms (website, YouTube, Vimeo, social media) | <ul style="list-style-type: none"> • Takes time and some technical skill to film, edit and upload • Requires participants to tell their story face to face • Some participants don't feel comfortable on camera • May be less convenient for the audience to view and track key information • Challenging to communicate detailed information |
| Visual (eg storyboards, slides, infographics)  | <ul style="list-style-type: none"> • Visual presentation makes them easy to read and understand • Clearly identify key tasks, processes and decisions • Break down complex information into simple messages • Can add quotes from key participants to emphasise key points | <ul style="list-style-type: none"> • Only a limited amount of detail can be included • Audience may need additional information to properly understand the context, process or key learnings |

Guide 1: Planning your case study

Creating useful case studies

Case study planning tool – Part 1

These reflective questions are designed to guide you through the process of deciding what is required for your case study. Remember to be as specific as possible.

Before you start ...

WHY are you creating a case study?

Define your purpose.

Set a clear intention / specific objectives for the case study:

- What difference will it make
- How will you measure success?

WHO is your target audience?

Describe who you are creating your case study for (eg potential clients vs existing clients, funding body vs your peers):

- What is important to them
- What do they already know
- What experience do they have
- What are their characteristics, experiences, preferences, abilities and circumstances?

WHAT is your key message?

Specify what you want to tell your audience and what they will do with that information:

- What's the most important thing that you want your audience to learn/understand
- How will your audience use / apply the information
- What do they need to know to take action
- What will engage your audience?

WHEN and HOW will you share your case study?

Clarify the context of when and how they will engage with the information:

- When will your audience engage with the case study? How will they find it
- What would make the case study appear useful and worth investing their time reviewing
- What other information will be available to them?

[Download Tool](#)

You can download a Microsoft Word version of the tool by clicking the download button.

Guide 1: Planning your case study

Creating useful case studies

Designing your content

Once you have determined the purpose and audience of your case study, you can begin to design your content.

There is no one size fits all approach that works for case studies. It can be tempting to include every detail and hope that your audience will find the parts that are useful to them. Remember that your audience is just as busy as you are. Keep it simple and tell a clear story that is specific to your audience. Prioritise your content and at every step of the design process, keep in mind who you are writing for and why.

For example, if you are creating a case study that describes a new program, the focus will still depend on your audience. If you are creating the case study for:

- Other services – focus on what is new, different and innovative about your program.
- Existing clients – focus on what will change for them. How will their experience be different if or when they move to this new service?
- Management / funding body – focus on what difference it makes. Does the new program achieve better outcomes, efficiencies, alignment with funding requirements etc?

When deciding what information to include always keep your purpose front and centre

Tell your audience why your case study is important and how it relates to them.⁶ Focus on the information they need to understand the key issues and your decision making.⁴⁵ Your case study should lead them through the process so they can see how it can be useful to them.

For example, if you were presenting a case study of one of your clients to your team for discussion, you need to include enough information for other staff to understand how and why you made certain decisions along the way. Focus on details that guide your team to a logical conclusion or point of discussion.

Be thoughtful about how you frame your case study

Case studies are most effective when they reflect what you're doing. Focus on the processes, decisions, tools and systems that were involved. Consider when and how to de-identify a case study (including protecting the anonymity of consumers and staff).

For example, If your audience is:

- Potential clients – consider what concerns, questions or preconceived ideas they may have about your service. Hearing about other people's experiences can normalise your audience's feelings and create an opportunity to discuss them.
- Other staff – consider what challenges they are experiencing in their practice.

Structuring your case study

For a case study to be useful, it needs to do more than just tell your audience what happened. Remember that you're telling a story. You need a beginning, a middle and an end.¹⁰ Finish off with a call to action so that your audience is clear about the next steps for them.

Guide 1: Planning your case study

Creating useful case studies

Structuring your case study

| Beginning | Middle | End | Call to action |
|--|---|---|--|
| Where did you start? | What happened? | What difference did it make? | What can the audience do with the information? |
| <p>What was happening at the time (background / context)</p> <p>What was your rationale for starting (consider any key decision points, goals or drivers)</p> <p>What opportunities, challenges or issues, were you addressing (include key emotions and concerns to ensure the story connects with your audience)</p> <p>What drove you to engage / make a decision</p> <p>Why did you choose this approach</p> | <p>What did you do (be specific)</p> <p>What were the key features of your approach / plan</p> <p>What worked and what didn't work</p> <p>What was your experience</p> <p>Who was involved</p> <p>What was each person's role</p> | <p>What did you achieve</p> <p>What did you learn</p> <p>What evidence do you have to support your learning (eg data, observations or other proof)</p> <p>Were there any surprises / unintended consequences or benefits</p> <p>What difference did it make</p> | <p>What is the next step for your audience</p> <p>How could others replicate your success / learning</p> <p>What could others learn from your experience</p> |

Guide 1: Planning your case study

Creating useful case studies

Collecting information for your case study

There are lots of different ways that you can collect information for your case study. This could include:

- Interviews with key people (consumers, staff, referrers, service delivery partners)
- Direct observations (eg actions, interactions, environments or events)
- Feedback (eg consumer or staff surveys, focus groups, compliments and complaints)
- Client files / records (eg assessment and care planning tools, progress notes, reports)
- Evaluation reports
- Documents (letters, articles, reports, theory, published evidence)
- Physical equipment, resources and artifacts (examples of staff work, completed tools).²³⁵⁷

Using information from multiple sources can provide credibility and support you to understand the case within a broader context (eg implementing a new policy initiative or evidence based approach). When you are designing your content, keep in mind:

- What information will be meaningful to your audience

- What will compel your audience to take action
- What do they need to know to understand your decision making process etc
- What information will allow you to answer key questions or understand the real issues?

In some cases, it can be useful to relate the case back to existing evidence, policy or theory. This provides context and frames why the case is important or relevant⁹. It also sets you up to discuss the similarities or differences in your findings (ie does this case support existing evidence or present a new or different experience).

For example, if your case study describes a new program, you may want to include a description of the service and / or a client's pathway through the program. It is often necessary though to include additional information that will provide context for your reader. This could include statistics about the issue / challenge that the program addresses and / or an overview of existing evidence that informed your program design. The focus and level of detail will be determined by your purpose and audience.

Guide 1: Planning your case study

Creating useful case studies

Choosing case study participants

One of the great benefits of case studies is that they use stories and experiences to communicate your message. This helps people engage with the information and understand ideas in context. To make the most of that opportunity, it's important to select cases that fit your purpose. Often people choose to highlight success stories. However, it's equally useful to create case studies when something hasn't worked as this provides an opportunity for learning.¹²

Your case study can describe the experience of an individual client (or multiple clients), the application of a particular tool, an aspect of service delivery, or more broadly, case studies can describe a program or service. The focus of your case study should always be driven by its purpose and audience.

Regardless of the type of case study, there are a number of ways that you can select participants. You may wish to use a case study to describe:

- **Common practice / events / issues.** Choose participants who are representative of the group or issue that is being discussed (ie demonstrating what usually happens).
- **Special, unique or unexpected cases or outcomes.** These case studies may focus on usual practice that resulted in an unusually successful or challenging outcome, a unique presentation or novel way of working. Select cases based on their uniqueness, not because they are representative of your broader work.^{6 9 13 11}

Sometimes it's useful to choose participants who are similar to your target audience. This can help people relate to the participants and understand the relevance to them. This is especially useful when your case study aims to demonstrate how you achieved a change (eg staff applying a new skill or showcasing your program to potential clients). When selecting case study participants, consider:

- Whose perspective adds the most value / communicates the important messages
- If you want to hear from consumers, staff, other service providers
- Who your audience will relate to
- Your access to people and other information sources (which information is best sought directly from people)
- Likely burden and risks of asking people to participate (ethical implications).

You can also weave together multiple people's perspectives to tell a broader story. Including a number of people can build reliability or add weight to common experiences.² When you include a range of people who have shared similar experiences, it can also help you connect with a broader audience.

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Creating useful case studies

Choosing case study participants

For example, you could include a number of clients who describe their experience of receiving a personal care service. By choosing clients with diverse backgrounds or experiences you can demonstrate the similarities and differences in their stories.

If your case study is targeting potential clients, then including a range of clients will make it more likely that your audience will connect with the experience of one of your participants.

You can develop multiple case studies which describe how different people experienced the same event (eg tool, approach or intervention) and achieved very different outcomes.⁹ This can highlight how personal, environmental or contextual factors impact on each person's outcomes. Be careful when selecting multiple cases to ensure that the focus remains on your key message/s and your audience doesn't get lost in other details along the way.

For example, while you could present multiple client's experience of the service, you could also create a case study that includes both the staff and consumer's experience of the personal care service.

This may allow you to illustrate the importance of certain features, or back the consumer's experience up with the staff member's perspective regarding the rationale, decision points, outcomes or supporting evidence.

You could also create a case study that describes different ways to deliver personal care then discuss the emerging similarities and differences between those cases to explore why one approach is more effective or preferred by clients.

You can also highlight one client's experience within a number of case studies. This way, the audience can quickly take in new information as they already know the person's history.¹¹

For example, you could create a set of case studies that describe one client's experience of participating in a number of your different programs or activities. Each case study effectively builds on the previous one, so the reader learns more about the person as they progress through the set of case studies (without having to recap core details every time).

Guide 1: Planning your case study

Creating useful case studies

Collecting information from your participants

Make it as easy as possible for people to participate. Be sure that you and your participant are clear about the purpose of the case study and how it will be used.

Before speaking to your participant

- Be clear about what you want to achieve and what you're asking of them (eg time commitment, purpose and audience, key content). This will ensure your participant can be prepared and feel confident.
- Consider what's in it for your participant? Could they use the case study for their own benefit in some way?
- Share other case study examples so the participant gets an idea about what the final product will look like.
- Consider the best way to have the conversation (face to face, over the phone, video conference, via email / in writing). Consider cultural respect and safety.
- Scheduling – choose a time and place that is convenient for your participant.
- Confidentiality – assure them about how the case study will be used and when / how they will be able to sign off on the final product (in line with your organisation's privacy and consent policy).
- When speaking with staff, provide them with a written summary of everything the case study will involve to pass on to their manager for approval.

At the beginning of your conversation

- Reinforce that you want to hear the participant's story. They can't get it wrong. You just want to hear things from their perspective.
- Take the time to make sure everyone feels comfortable before launching into your questions.

During your conversation

- Ask open ended questions.
- Approach it like a normal conversation. If your participant gives you an answer you didn't expect, follow up to get more information and explore any relevant learnings.
- Record your conversation. This allows you to easily access quotes, without having to interrupt the flow of the conversation. Be sure to ask for consent and be clear about how you will use the recording.

After your conversation

- Thank your participant and let them know what will happen next. Ensure you follow through as this values their contribution.
- Remember that you do not need to include every detail of your conversation. After your conversation, go back and edit the content to select the most relevant and important information.

Guide 1: Planning your case study

Creating useful case studies

Case study planning tool – Part 2

These reflective questions build on Part 1 of the case study planning tool. They are designed to help you determine the best way to collect information, prioritise content and present your case study.

Designing your approach

How will you collect information?

Interviews (who and why).

Other information sources (observation, feedback, client files, evaluation or project reports, research).

Designing your content / what to include

Note: Remember, you don't need every detail. Consider what information is most relevant to your audience and only include the information you need to communicate your message.

What is the context in which the case study occurred?

Set the scene by introducing:

- The background / rationale
- The key people and their goals
- The issues, challenges or opportunities you sought to address
- Why you chose this approach?

What happened?

What are the key features / interventions that you delivered?

Who was involved and what was each person's role?

What was your experience?

What difference did it make?

What outcomes did you achieve?

Can you support your findings with evidence (eg quantitative or qualitative data, research)?

What did you learn?

Be specific about the elements that made your approach stand apart / worth presenting.

Consider the benefits and challenges, enablers and barriers.

If you were going to do it again, what would you do the same and what would you change?

How could your audience use this information?

What is their next step?

How could others replicate your learning?

[Download Tool](#)

Guide 1: Planning your case study

Resources

Budgell, B (2008) **Guidelines to the writing of case studies.** J Can Chiropr Assoc 52(4) pp 199-204. Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2597880/>

MS Trust (2018) **Top tips: writing a strong case study.** Available at: <https://www.mstrust.org.uk/sites/default/files/Top tips for writing case studies FINAL.pdf>

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¹ Aitken, L.M., Marshall, A.P. (2007) **Writing a case study: ensuring a meaningful contribution to the literature.** Australian Clinical Care 20(4) pp 132-136. Available at: [https://www.australiancriticalcare.com/article/S1036-7314\(07\)00108-7/fulltext](https://www.australiancriticalcare.com/article/S1036-7314(07)00108-7/fulltext)

² Alpi, K.M. & Evans, J.J. (2019) **Distinguishing case study as a research method from case reports as a publication type.** Journal of the Medical Library Association, 107(1) January 2019 pp 1-5. Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6300237/>

³ Monash University (2020) **Writing a case study: Quick study guide.** Available at: <https://www.monash.edu/rlo/quick-study-guides/writing-a-case-study>

⁴ Downer, A. & Swindells, S. (2003) **Developing Clinical Case Studies: A guide for teaching.** Prepared for the AIDS Education and Training Centers National Resource Centre (AIDSETC), New Jersey USA. Available at: https://www.go2itech.org/HTML/CM08/toolkit/tools/print/casebased/Developing_Clinical_Case_Studies.pdf

⁵ Budgell, B (2008). **Guidelines to the writing of case studies.** J Can Chiropr Assoc 52(4) pp 199-204. Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2597880/>

⁶ Carleton, H.A. & Webb, M.L. (2012) **The case report in context.** Yale Journal of Biology and medicine 85(1) pp. 93-96. Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3313543/>

⁷ MS Trust (2018) **Top tips: writing a strong case study.** Available at: <https://www.mstrust.org.uk/>

[sites/default/files/Top tips for writing case studies FINAL.pdf](https://www.mstrust.org.uk/sites/default/files/Top tips for writing case studies FINAL.pdf)

⁸ Baker, G.R. (2011) **The contribution of case study research to knowledge of how to improve quality of care.** BMJ Qual Saf 20(Suppl1) pp i30-i35. Available at: https://qualitysafety.bmj.com/content/20/Suppl_1/i30

⁹ Crowe, S., Cresswell, K., Robertson, A., Huby, G., Avery, A. & Sheikh, A. (2011) **The case study approach.** BMC Medical Research Methodology 11:100 pp 1-9. Available at: <https://bmcmedresmethodol.biomedcentral.com/articles/10.1186/1471-2288-11-100>

¹⁰ Fraser, S. (2003) **Project storyboards: catalysts for collaborative improvement.** International Journal of Health Care Quality Assurance 16(6) pp 300-305. Available at: <https://doi.org/10.1108/09526860310495688>

¹¹ Yin, R.K. (2018) **Case study research and applications: design and methods. 6th ed.** Thousand Oaks, CA. SAGE Publications; 1995

¹² Griffith University (2011) **Writing a case study.** Griffith University, NSW. Available at: <https://studylib.net/doc/8766992/writing-a-case-study---griffith-university>

¹³ Gilson, L. ed. (2012) **Health Policy and Systems Research: A Methodology Reader.** Alliance for Health Policy and Systems Research, World Health Organisation, Geneva. Available at: https://www.who.int/alliance-hpsr/alliancehpsr_reader.pdf

Guide 2: Written case studies



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Guide 2:

Written case studies

Written case studies allow you to combine information from a range of sources. You can also add quotes, images and data to communicate your key messages. This enables you to present detailed information, complex ideas and findings clearly and effectively. You can provide your audience with electronic or hard copies of the case study which makes them convenient and easy to share.

Before you start writing, consider whether a written case study is the best fit for you.

Note: Refer to *Guide 1: Planning your case study* for more information about understanding the best way to present your case study.

Tips for writing case studies

- Stay focussed on the purpose of your case study. Write your purpose at the top of the page and refer back to it as you're writing and editing your case study. This will help you prioritise key information and remove any unnecessary details.
- Always keep your target audience in mind (who are they, what do they already know, why are they interested in your story).
- Adopt a strong narrative voice – use active language to tell the story.
- Avoid jargon, acronyms and technical language (remember your target audience).
- Think about the best way to present the information. It doesn't always have to be written in a long-form essay style. Break up your writing with headings, bullet points, lists, charts, images, statistics or quotes.
- Try to refer to people by name (using pseudonyms where appropriate). Using names is more personal and engaging for the audience.
- Be thoughtful of the privacy of your participants. De-identify people, places and services (where appropriate) to protect the confidentiality of everyone involved.
- Provide your participants with the opportunity to review the case study and provide feedback. This ensures that you have interpreted your participant's experiences and comments accurately. Confirm that your participants are happy for the case study to be shared (as per your organisation's consent policy).
- Use plenty of white space to make it as easy to read as possible (ie blank space between your text and images).
- Support your story with quotes, statistics, references or other evidence. Remember to cite the source of references, data etc.
- Keep it simple and relevant. You don't need every detail.
- Revise, revise, revise! Ask for feedback to make sure that your key messages are clear to your audience.¹²³⁴⁵⁶⁷

We have created the following templates to guide you through the process of putting together your written case study. You can download Microsoft Word versions of the tools by clicking the download buttons.

Note: These tools are designed to be used after the case study planning tools provided in Guide 1.

Guide 2: Written case studies



[Download Template](#)

Case study planning tool – Written case studies

Purpose of the case study

Presentation / format

Target audience

Putting together your written case study

Note: The reflective questions included in *Guide 1: Case study planning tool* should inform the content requirements of your case study.

Information sources

Where will you collect the most relevant information?

Consider consent requirements.

Support Materials

- Best practice evidence
- Quotes
- Statistics
- Graphs / data.

Consider consent requirements.

Drafting & approval process

Ask everyone involved for their feedback.

Obtain the participant's approval for you to use / share the case study.

Guide 2: Written case studies



[Download Template](#)

Written case study template – Client story

Purpose of the case study

Presentation / format

Target audience

Key Headings

Remember to keep it simple – you do not need to include every detail.

Stay focussed on your purpose and audience (why are you writing a case study and who it is for). Consider what information is most relevant to communicate your key messages.

Title

Use a catchy title that relates to your key message.

Introduction

Provide a brief overview of the purpose of your case study. Tell your audience what you want them to know and why it is relevant to them up front.

Background

Provide a summary of the client's situation prior to working with you.

Why did they come to you? What were their goals, priorities and needs?

Are you describing common practice or an unusual situation? Describe what was unique or different.

What other information does your audience require to understand the context of this case study? Do they know about your organisation, discipline, model of service, environment, client group, service requirements etc?

Action

Describe key elements of your approach (what information does your audience need to understand your key messages).

Why was this approach appropriate for this client?

Who was involved? What were the roles of the key people?

What worked and what didn't work ... and why? Consider specific benefits, challenges, enablers and barriers.

Outcomes

Identify what changed (provide evidence to support your findings).

What difference did it make (for the client, carer/s, staff, organisation/system, partnerships etc)?

Were there any surprises or did anything unexpected happen (eg unintended consequences or benefits)?

Next steps

How will this case study impact the way you work moving forward?

What could others learn from your experience?

How could others replicate your success / learning?

Guide 2: Written case studies



[Download Template](#)

Written case study template – Service innovation

Purpose of the case study

Presentation / format

Target audience

Key headings

Title

Use a catchy title that relates to your key message.

Introduction

Provide a brief overview of the purpose of your case study.

What do you want your audience to know? Why is it relevant to them?

Context

Outline the background about why you undertook this service innovation.

What was your rationale for the initiative? What challenges, issues or opportunities did you want to address (ie your drivers)?

What change or improvement were you hoping for?

What evidence did you have to suggest this was an appropriate response to the challenge / situation?

Implementation

Describe key elements of your approach (be specific about what you did).

Who was involved? What were the roles of key people?

What key resources were required for implementation?

What is new or different about your approach? Highlight the innovation.

What worked and what didn't work ... and why? Consider specific benefits, challenges, enablers and barriers.

Outcomes

Identify what changed (provide evidence to support your findings).

How has the experience or outcomes of clients, carers, staff, organisations / systems and / or partnerships changed? How is this different from other interventions?

Were there any surprises or did anything unexpected happen (eg unintended consequences or benefits)?

Key learnings

Be specific about the elements that made your approach stand apart / worth presenting.

Consider the benefits and challenges, enablers and barriers.

If you were going to do it again, what would you do the same and what would you change?

Next steps

What is the next step for you AND for your audience? What is required to move forward?

How could others replicate your success / learning?



Guide 2:

Written case studies

Resources

For examples of case studies from the aged and community care sector go to **How to Create Great Case Studies**: <https://www.bit.ly/great-case-studies>

Menon, D (2019) **When to use case studies in your writing**. Health Writer Hub. Sydney, Australia. Available at: <https://www.healthwriterhub.com/use-case-studies/>

MS Trust (2018) **Top tips: writing a strong case study**. Available at: <https://www.mstrust.org.uk/sites/default/files/Top tips for writing case studies FINAL.pdf>

Monash University (2020) **Writing a case study: Quick study guide**. Available at: <https://www.monash.edu/rlo/quick-study-guides/writing-a-case-study>

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Methodology 11(100) pp 1-9. Available at: <https://bmcmedresmethodol.biomedcentral.com/articles/10.1186/1471-2288-11-100>

Creating accessible written resources (health literacy)

The following organisations have created and collated a range of useful tools and resources for consumers, staff and organisations to support improvements in health literacy:

- **Australian Commission on Safety and Quality in Health Care (ACSQHC)**: <https://www.safetyandquality.gov.au/our-work/patient-and-consumer-centred-care/health-literacy/tools-and-resources-for-health-service-organisations>
- **The Centre for Culture, Ethnicity and Health**: <https://www.ceh.org.au/resource-hub/category/health-literacy/>
- **Medline Plus**: <https://medlineplus.gov/healthliteracy.html>

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¹ Budgell, B (2008) **Guidelines to the writing of case studies**. J Can Chiropr Assoc 52(4) pp 199-204. Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2597880/>

² Menon, D (2019) **When to use case studies in your writing**. Health Writer Hub. Sydney, Australia. Available at: <https://www.healthwriterhub.com/use-case-studies/>

³ MS Trust (2018) **Top tips: writing a strong case study**. Available at: <https://www.mstrust.org.uk/sites/default/files/Top tips for writing case studies FINAL.pdf>

⁴ Carleton, H.A. & Webb, M.L. (2012) The case report in context. Yale Journal of Biology and medicine 85(1)

pp. 93-96. Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3313543/>

⁵ Stake, R.E. (1995) **The art of case study research**. London; Sage Publications Ltd.

⁶ Crowe, S., Cresswell, K., Robertson, A., Huby, G., Avery, A. & Sheikh, A. (2011) **The case study approach**. BMC Medical Research Methodology 11(100) pp 1-9. Available at: <https://bmcmedresmethodol.biomedcentral.com/articles/10.1186/1471-2288-11-100>

⁷ UNSW (2018) **Writing the case study**. University of New South Wales (UNSW), Sydney NSW. Available at: <https://student.unsw.edu.au/writing-case-study>

Guide 3: Video case studies



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Guide 3: Video case studies

Creating case study videos

Videos can be a really engaging way to create a case study. Putting a face to the story can add credibility and demonstrate authenticity. Watching people tell their own story allows the audience to collect lots of information about the person and their experience without having to use words to describe it.¹ Your audience can connect with the participants more easily and better understand their emotions and experiences.

Before you start filming, consider whether a video case study is the best fit for you.

Note: Refer to *Guide 1: Planning your case study* for more information about understanding the best way to present your case study.

Tips for creating video case studies

Always stay focussed on your case study's purpose and audience. Be clear about your key messages and only include information that is relevant to your story. Editing is key.

Choosing your participants

When creating video case studies, choose participants who:

- Have an interesting and/or emotional story to tell
- Are willing to discuss their situation, how you worked together and what difference it made for them
- Feel comfortable speaking on camera.

It is impossible to completely de-identify your participants in a video. Be sure to consider the privacy of everyone involved and gain consent to film and share the video (in line with your organisation's policy and procedures). Make sure your consent form clearly describes how and where you will share the video.

Producing your own video

With modern technology, recording videos has become very easy. They can be created with a

smartphone or tablet and free editing software. Consider these tips when producing a video case study:

- When filming your video, the most important things to consider are light and sound.
- Position your subject so they have light on their face (avoid shadows). Make sure you can see your participant's eyes clearly. Where possible, position the participant facing a window (so that the window is behind the camera).
- It's essential that viewers can easily hear what your participant says. Consider using an inexpensive lapel microphone that plugs into your device or camera.
- Let your participants know they don't need to wear more makeup than usual or wear makeup at all if that's not what they normally do.
- Ask participants to bring a couple of tops so you can choose something that isn't the same colour as the background. It gives you choices so that participants aren't all wearing the same colour. If staff normally wear uniforms they should wear these.²

Guide 3: Video case studies



Creating case study videos

If you have the budget to access support, you can outsource parts, or all of your video production. Accessing support to edit and produce the video can be useful to ensure a professional product and streamlined messaging. It may be useful to share copies of your case study planning tools with your video editor (see page 31). This is an easy way to make sure your editor understands the purpose of the case study and the key messages you want to communicate.

It may be useful to break your case study down into bite size chunks. Consider creating a suite of short videos, each focussing on one key message, rather than creating one long video. This allows people to access the information that is relevant to them more easily.

Add statistics, graphs, titles or voiceovers to reinforce your key message.

Consider the accessibility of your video and make sure it can be used effectively by your audience.

Note: Please refer to the Resources section for further information about video accessibility.

Sharing your video

While videos can be shared via a range of platforms (website, YouTube, Vimeo, social media) you need to consider how accessible the case study will be for your audience. This may be impacted by their access to technology, internet speed and your audience's abilities and preferences (eg vision and hearing, technical literacy etc).

Keep in mind the longevity of videos, particularly when uploading them online. Review the case studies you share online periodically to ensure they remain relevant and appropriate.

On the following pages, you will find a template that leads you through the process of putting together your case study video. This tool is designed to be used after the planning tools provided in *Guide 1: Planning your case study*.

Guide 3: Video case studies



[Download Template](#)

Case study planning tool – Video case studies

Preparing to video

Participant details

Document all participant and crew details for inclusion in credits / video details.

Consider any other people who should be referenced or thanked in the video credits.

Participant consent

Gain written consent to film / record your client / participant and share the information (in line with organisational policies and procedures).

Filming schedule

Date and time.

Select location/s

- Consider participant's needs (eg access, mobility, sensory abilities etc), comfort and convenience
- Consider suitability for videography (eg quiet, well-lit location)
- Ensure relevance / consistency with the purpose of the video and key messages.

Organise relevant equipment / resources

- Video camera or device
- Microphone
- Lighting
- Resources or equipment that are relevant to support the video content and messaging (eg program resources you may demonstrate / show during video, organisational signage / branding materials to include).

Logistics

- Participant (and staff) transport
- Wardrobe / hair and make-up requirements
- Refreshments.



Guide 3: Video case studies

Key interview questions

Interview questions should set up your client to tell their story and address the key message of the case study through their answers.

Overarching purpose of the video

Target audience

| Purpose of question (Information required) | Question | Notes |
|--|----------|-------|
| | | |
| | | |

Putting together your video

For each section, consider:

- What are you trying to achieve
- What is required.

Supplementary footage to break up the interviews and keep people engaged

- People in action
- Signage / location
- On screen text / graphics
- Graphs / data.

Supplementary footage reinforces the narrative being told through interviews.

Music to set the tone.

Consider your **visual style / branding**.

Approval and sign off

When you're finished, ask everyone involved for their **feedback and get their final confirmation** for you to use / share the case study.



Guide 3:

Video case studies

Resources

For examples of case studies from the aged and community care sector go to **How to Create Great Case Studies**: <https://www.bit.ly/great-case-studies>

Skeleton (2016) **The straightforward guide to case study video**. Available at: <https://www.skeletonproductions.com/insights/case-study-videos-guide>

Cordukes, A. (2018) **Health and Medical Video Case Studies**. Laundry Lane Productions, Sydney, NSW. Available at: <https://laundrylane.com/video-for-healthcare/health-medical-video-case-studies/>

Creating accessible videos

Australian Government (2020) **Accessibility and inclusivity: Digital guide**. Created by the Digital

Transformation Agency for the Commonwealth of Australia, Canberra. Available at: <https://guides.service.gov.au/content-guide/accessibility-inclusivity/>

AccessibilityOz (2020) **Video accessibility principles**. Available at: <https://www.accessibilityoz.com/factsheets/video/video-factsheet/>

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¹ Van Den Berg, E., Jansen, L., Blijleven, P. (2004) **Learning with Multimedia Cases: An Evaluation Study**. Journal of Technology and Teacher Education 12(4). Society for Information Technology & Teacher Education, Waynesville, NC USA.

² Burrell-Davis, S. (2020) **Personal Interview** April 2020. Red Hat Films, Melbourne, Vic. Further information available at: <https://www.redhatfilms.com.au/>

Guide 4: Visual case studies



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Guide 4: Visual case studies



Creating visual case studies

Visual case studies use a range of tools and imagery to communicate your key message. They can include:

- Pictures / photos
- Figures
- Charts / graphs
- Flowcharts
- Graphics
- Symbols / icons
- Colour
- Typography.

Presenting your case study visually allows you to communicate your message quickly and easily. This can be especially useful when people are busy and unlikely to read lots of text. Visual case studies work best when you have one clear message to communicate. This may be a process, tool, strategy or outcome.^{1,2,3,4}

Before you put together your case study, consider whether a visual case study is the best fit for you.

Note: Refer to *Guide 1: Planning your case study* for more information about understanding the best way to present your case study.

There are a range of ways you can present your case study visually. This could include:

- **Posters** can incorporate any combination of text and images to communicate your message. They can be a visually engaging way to share information and displayed in common spaces to capture people's attention and promote discussion (eg client waiting room or staff room).
- **Storyboards or flowcharts** illustrate the key steps or processes you took and the lessons you learned. Creating storyboards can be a useful way to describe what you did, identify key decision points, demonstrate your problem solving approach and outcomes. Flowcharts are especially useful to demonstrate the sequence of events or how each part of a process links together.
- **Infographics** use charts and diagrams to represent information, ideas or key learnings. Infographics are especially useful to link key processes with statistics.
- **Presentation slides** (eg PowerPoint presentation) allow you to combine visuals with key words, statistics and other data. These can be presented live (in-person) or recorded with a voiceover. They are especially useful to promote conversation and encourage your audience to interact with the case study (eg by including key questions or discussion points throughout the presentation or at the end).
- **Photoboard**s include a series of photos which are annotated to describe key processes, progressions and changes / outcomes. This is a great way to communicate simple messages and learnings.

Guide 4: Visual case studies



Tips for creating visual case studies

- Keep in mind the purpose, audience and key message you are communicating.
- Keep your messages clear and concise. Your audience should be able to absorb your key message quickly and easily (and read all of the content within a few minutes).
- Combine words and imagery to tell your story clearly. Integrate quotes, statistics and evidence with photos or images to emphasise your message.
- We naturally read from left to right, top to bottom. Arrange your information so the messages are presented sequentially.
- Make sure it is engaging and visually appealing.
- Avoid clutter and don't overcomplicate the case study with too much information or by using too many different fonts, styles, colours etc. Maintain plenty of white space (blank space around the words and pictures).
- Use visual cues such as colour, frames, arrows etc to highlight important elements.
- Be thoughtful of the privacy of your participants. De-identify consumers, staff, places and services (where appropriate) to protect the confidentiality of everyone involved.
- Consider how you can encourage people to interact with your case study. Think about how it can be used to promote discussion, encourage change or action of some kind.
- When creating a poster or chart that will be displayed in a public space, consider how and where people will view it (make sure the text is readable from a distance).¹³⁵⁶⁷⁸⁹



Guide 4:

Visual case studies

Resources

For examples of case studies from the aged and community care sector go to **How to Create Great Case Studies**: <https://www.bit.ly/great-case-studies>

Abbaszadegan, H. (2014) **How to write and abstract and make a great poster**. Presentation, University of Arizona, Phoenix AZ. Available at: https://www.acponline.org/system/files/documents/about_acp/chapters/az/great_abstract.pdf

ASQ (2020) **What is a flowchart?** American Society for Quality (ASQ), WI USA Available at: <https://asq.org/quality-resources/flowchart>

Ideaform (2018) **The complete guide to creating infographics**. Format Team, Ideaform. Available at: <https://www.format.com/magazine/resources/design/how-to-make-an-infographic>

NYU (2020) **How to create a research poster: poster basics**. New York University, NY. Available at: <http://guides.nyu.edu/posters>

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Guide 5: Making the most of your case studies

Sharing your case studies

To make your case studies as effective as possible, you need to share them with your audience. Case studies can help your audience:

- Get to know you / your service (including what makes you different)
- Decide whether you are a good fit for them
- Build trust and credibility
- Understand what you do and how
- Learn about the value of your approach
- Feel confident that you are doing what you say you do and can deliver the results you claim to
- Be motivated to change their behaviour, try something new or different
- Develop their analytical and problem solving skills.

1 2 3 4

What's the point of creating great case studies if no-one will ever use them

Remember, case studies don't need to be perfect for them to be useful. It's just as useful to describe what didn't work as it is to describe what works. Case studies that describe common challenges can be particularly useful to support reflective conversation among staff and advocate for change with leaders and funding bodies.

Sharing your case study

Where and how you store and use your case study depends on its purpose, audience and how it fits with

other information. Involve your audience to find out the most appropriate ways to share and store your case study. Ideally, this will be done as part of your initial planning. Information can be presented in a range of formats, so be creative. You may consider sharing your case studies via:

- **Professional development**
Team meetings, case conferences or supervision
- **Events**
Conferences, forums, network meetings
- **Newsletters**
For consumers, staff, peer networks etc
- **Education and training**
Face-to-face or online
- **Online**
Website, YouTube, Vimeo or social media
- **Reports**
Evaluation, project or quality reports
- **Service information and marketing materials**
Brochures or posters
- **Media reports and posts**
- **Journal articles**
- **Funding applications.**

Make sure you inform your participants about how you intend to share your case study and obtain the appropriate consent (in line with your organisation's policies).

Guide 5: Making the most of your case studies

Storing your case studies

Within your organisation, be consistent about how and where you store case studies. If you share them in a common place, more people will be able to benefit from their use. This also means you'll be prepared when someone asks you to provide a case study (eg to support a funding application or to include in a quality report).

Remember that case studies represent a specific point in time – the value of a case study may therefore be time limited. Think about how you track the currency of your stored case studies, so that they remain relevant and fit for purpose.

Be sure that your case studies are organised, accessible and easy to find.

Ongoing use of case studies

As we've described, case studies can be a highly effective education tool. They can be used to provide information for people who use your service, new and existing staff, internal and external stakeholders.

To make the most of the case study, consider how it will be used and what other information will be available to support the audience to understand and use the case study. There are a range of ways the audience can actively engage with the information. This could include:

- Identifying the key decision points and learnings from the case study
- Reviewing the potential gaps in knowledge and practice (which could assist to identify ongoing learning opportunities)
- Sharing how you could approach a similar situation in the future
- Brainstorming ways to address the challenge presented in the case study
- Understanding how others have coped with similar challenges
- Discussing how you could apply the lessons learned within your own services, or with your clients.

For example, you create a case study to discuss at a team meeting. It describes a client story where you identified room for improvement. It includes a summary of the client's situation, how you worked together, outcomes and the challenges you experienced along the way. Within the team meeting, you could then present that case study to the group, discuss your experience, what worked well, what didn't work and brainstorm other ways to address this challenge in the future.

If you de-identify the case and record brief notes from your team meeting conversation, this can become a valuable learning tool for staff in the future. It could be used as part of orientation for new staff, within supervision sessions, or as part of your evidence to advocate for new resources, processes, funding etc.

Guide 5: Making the most of your case studies

When presenting case studies for group discussion:

- Clarify the purpose of the case study and your discussion at the beginning (and as often as necessary to keep the group on track).
- Establish guidelines or ground rules for your discussion (eg everyone's opinion is valid, respect for differences of opinion, there may be no definitive correct answer).
- Model the ground rules throughout your discussion.
- Use the experiences of the group as a resource for teaching and learning.
- You do not need to respond to every comment individually. You can move to the next person wishing to comment or go to the group for a response.
- Actively invite ideas and suggestions from everyone.
- Plan your time thoughtfully so that you allow for meaningful conversation, interaction and exchange of ideas.
- Allow time at the end of the discussion to sum up what you have learned / discussed and clarify any follow up actions¹.

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For more information go to
bit.ly/great-case-studies

Acknowledgments

You can download the toolkit, including Microsoft Word versions of the interactive tools here.

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