Telling your story through case studies

A guide for community groups

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Introduction

A case study is a detailed story of a specific subject – such as a person, group or project. Case studies can be useful for showcasing the activities, challenges, and lessons learned from a particular initiative - sharing the story behind the numbers, and providing real, relatable examples. They can be a very effective way of communicating the impact of a particular project, in a way which is practical, authentic and meaningful.

This guide provides step-by-step advice on how to plan and create written or video case studies on community-led projects. It is aimed grassroots community groups of all scales, and it covers the things to think about, key tips, and links to follow on resources or tools.

The guide has been produced by Inspiring Scotland for the the Scottish Rural Network to support people undertaking community-led local development (CLLD) in rural and island Scotland.

You can see some example case studies at ruralnetwork.scot/case-studies

Who is this guide for?

This guide is for grassroots community groups who have be delivering projects in their local area, and who want to create a case study to help tell the story of their work.

This guide will help you to:

1. Plan your case study
2. Choose the best form of case study for your needs
3. Learn the tips and tools that can help you

Getting Started

Before you start writing or recording your case study, you need to do some preparation work. Here are some steps to follow:

1. Why are you creating this case study?

You need to define the purpose and audience of your case study, and what you want to achieve. For example, it might be to help share your learning and experience with your peers, to support your future fundraising, or to feedback to your funders and partners about how your project has gone.

2. What do you want to showcase?

Choose a project, or an element of a project, that is relevant, interesting, and representative of your work or community. This should be something you can focus on in detail, and which you can explain to someone unfamiliar with your community. Ideally, it should be a project that is either underway or complete, so that you can reflect on the challenges and learning from the experience.

3. What are the facts?

Make sure you have enough information to tell your story. The evidence for a case study may seem like it speaks for itself, but it doesn't. Take the time to identify and examine the facts. What was the problem? Where did the project idea come from? Who was responsible? When did the change happen and why? What has the impact been for your community?

4. How will you tell your story?

Plan your case study structure and format. Depending on why you are creating the case study, you may want to use a written or video format, or a combination of both. You will also need to collect data, documents, photos, videos, and other materials that can illustrate the project's activities and outcomes.

5. Who needs to be involved?

The people involved in your project are the best people to tell its story, and you will need their consent and cooperation. Often the best way to gather insights and interesting information about your project is to interview the key people: the project leaders, participants, partners or other community members, to get their perspectives and feedback.

Structure, Format and Style

The next stage is thinking through how you will put your case study together.

Structure

When creating a case study, you want to ensure it is clear, concise and has an easy-to-follow, engaging structure.

A typical case study has these main sections:

- **The beginning**: Provide the background and context for when and where your project took place. Assume that your reader does not know your community, your local area, or what makes it unique.
    - *Where is your community? What is unique about it?*
    - *What was the problem at the time which meant your project was needed?*

- **The middle:** Explain how the idea for the project came about, and what steps you took to implement it.
    - *What happened next?*
    - *What challenges did you face (and how did you overcome them)?*
    - *What was a key turning point or milestone moment in the project?*

- **The end**: Detail what impact the project has had for your community, and what your leant as part of the process.
    - *How have things changed in the community since before the project began?*
    - *What would you do differently next time?*
    - *What advice would you give to other community groups thinking of doing the same kind of project?*
    - *What do you plan to do next or in the future?*

Format

You should choose the format for your case study based on what you are trying to achieve and what will work best for your community. Both written and video case studies are common when telling the story of community projects and have pros and cons:

Written	Video
• Best for facts and figures • Can be printed & available offline • Can be made quickly at low or no cost	• Best for people-centred stories • More engaging due to tone, gesture & facial expressions • Works well on social media
• Text is less emotionally engaging • Needs strong writing and editing skills	• More time intensive • Requires some equipment and/or software

You could also consider other formats, such as podcast episodes, Instagram stories, zines or other forms of multimedia communication.

Style

Think about how you want to present your case study and who you want to see it. You should consider:

- **Tone of voice**. You might use a more formal tone when creating a case study for sharing with funders or policy makers, or use a more informal approach for peers.
- **Images or graphics**. You might have lots of images of people participating in activities, or you might have data, graphs or quotes from research which could be included.
- **Logos, brand or colours.** You might have a logo or colours associated with your community group which could help make your case study look professional. If you have partners or funders involved in the project, you might want to include their logo too.

Tips for written case studies

Keep these tips in mind when drafting a written case study.

Choose a snappy title

A good title will capture the attention of the reader and give them a sense of what the case study explores.

Keep it concise

Most case studies are one or two pages in length.

Use headings

Clear sections help a reader to find the information most important to them.

Include evidence

Photos, quotes, graphs, posters, social media posts can all add interest and detail to your case study, illustrating what your main text describes.

Add links

Hyperlinks to websites, downloadable reports or partner organisation can help add detail it isn't possible to cover in your case study.

Add contact information

If you are happy for readers to contact your organisation with any follow-up questions or ideas, consider adding contact information at the end of the case study.

Get a second opinion

It is always helpful to get someone else who doesn't know the project well to read over your case study. They can help highlight where more explanation is needed, or spot any typos!

Creating your first video case study

Before you start creating a video case study, you need to do some preparation work. Here are some steps to follow:

Preparing

Schedule an interview time and place with the people you plan to include in the case study. Make sure they have an opportunity to ask any questions, and provide a list of the questions you will ask. Assemble the equipment you need, get familiar with how to use it, and make sure all batteries are charged for the day!

Filming

Give yourself enough time to undertake your filming – this could be over a morning or afternoon, over a few days, or during a community event. Filming in natural light in a quiet space will often produce the best results, however you may have to adapt to weather conditions or the space you have. Always film more than you think you need – it is better to have 'too much' footage than to find you missed that one key shot!

Editing

Depending on how much footage you have, and the length of your case study, this can be where most of your time in preparing the case study will take place. Some of the tools recommended in this guide provide useful templates, and there are lots of helpful YouTube tutorials if you want to learn more about editing.

Tips for video case studies

Keep these tips in mind when creating a video case study.

✔ Start with a hook

Start your case study with a compelling statistic or interesting quote draw the viewer in.

✔ Signpost more information

Unlike written case studies, you cannot add links to videos. However, you can add text to say where to go for further information.

✔ Use 'b-roll'

Break up interview footage with 'b-roll': video clips which show the community in which the project takes place, scenes of the activities in action, or the impact the project has had. If you have images or video of what the community was like before the project started, this can help tell the story of what change has happened.

✔ Consider the length

Case study videos work best at around 3 - 5 minutes in length. If you plan to upload your video to social media sites, make sure it is shorter than 2 minutes and 20 seconds (for Twitter) or create a short 'trailer'.

✔ Get a second opinion

Like with written case studies, it is always helpful to get someone else (preferably someone who doesn't know the project well) to review your video case study. You can also share it with people were interviewed to ensure they are happy with how they and the project have been presented.

Useful tools and equipment

There are lots of free or low cost tools and equipment that can help you create your case study - many of which come with free tutorials and support.

Word processing applications can be used to write and edit your case study. These tools often have in-built grammar and spelling checkers, which can help improve your writing style and accuracy. You can use web-based applications (like Google Docs) so more than one person can contribute to writing and editing simultaneously.

Canva is a free online, graphic design tool which helps you create interesting and professional visual materials without requiring graphic design skills. You can use their provided templates and download your design as a pdf or share it via a URL. It also includes simple video editing software. You can drag and drop your video clips, and add music, images or graphics.

For Apple iPhone and Mac users, **iMovie** is a free simple video editing application. More advanced video editing software includes paid-for phone apps, such as **InShot** (£18 a year) or professional programmes, such as **Adobe Premiere Pro** (around £35 per month for a subscription).
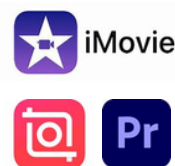
Most modern **smartphones** will have a camera that is suitable for recording good quality video footage (and you may be able to edit the footage on the phone too).

You can also use a **digital camera** that has a video recording mode. Most cameras will have an 'Auto' mode which can be used for simple filming, but if you are more confident in using a camera, you may want to adjust settings like the white balance and ISO to get your preferred exposure and brightness.

Shaky footage can be distracting for the viewer, so try to keep your camera as still as possible when filming. Using a **tripod** can solve this problem, and can be particularly helpful in indoor or dark conditions.

If you are filming your case study footage in noisy or windy places, a **microphone** can help improve the sound quality. You can purchase wired microphones (which plug into your camera), or Bluetooth microphones.

Tips for case study interviews

Interviewing community members, volunteers and project partners who can talk passionately (and accurately!) about your work will help tell your story, and provide rich detail for your case study.

When approaching people to be interviewed, there are a few things you can do to ensure that people feel comfortable, and you get good quality, informative and useful content for your case study.

Put people at ease

It can be nerve-wracking to agree to be interviewed - particularly on-camera! There are a few things you can do to help put people at ease:

- Provide the questions in advance so people can think about their answers and feel prepared.

- Always start with some simple questions to begin the interview (e.g. *What is your name? How did you get involved in this project?)*

- Ask follow-up questions if their answers highlight an interesting or unusual aspect of the project.

- At the end of the interview, give people an opportunity to share 'anything else' they think should be included in the case study.

Get their consent

To use someone's name, words, image or voice in any case study you produce, you must have their permission - typically through a consent form. They must be able to understand what they are giving consent for (including how the case study will be used), and their consent must be freely given. If someone is under 18 years old, their parent, guardian or responsible adult must be the one to provide consent.

Enable everyone to participate

Think about how to make your interviews easy and accessible to participate in. Be flexible to people's needs. For example, interviews could be in person, by phone or video call, over email, or even through voice notes. You could schedule interviews outside of working hours or fit in with caring or childcare responsibilities.

Example Consent Form

This free template from CharityComms is a good example of a consent form - which you can download and adapt for your needs. Download the template.

Master document: consent form   [Add your charity's logo]

CONSENT FORM

[Charity name] produces a range of communications resources to [explain the purpose of your communications work]. We like to share the experiences of real people who are using our services in our communications as it helps to demonstrate the difference our work is making. By completing this form, you give us permission to use your story in our communications for the next [period of time you will use their story for]. Thank you for your help.

Full name	
Address	
	Postcode	
Telephone	
Email	

What will my story be used for? [Please tick the options you are happy with]

Presentations: [Charity name]'s internal and external presentations ☐

Websites: [Charity name]'s website and intranet ☐

Social media: [Charity name]'s social media pages [include your social channels i.e. Twitter] ☐

Publications: [Charity name]'s leaflets, posters, newsletters and other marketing materials ☐

Print and online media: National, regional and local papers; magazines and news sites ☐

Television and radio: National and regional television; national, regional and local radio ☐

Can I remain anonymous?
You can choose to have your real name published with your story or remain anonymous (in which case, we will use a false name). Please tick one of the following options:

I am happy for my real name to be used ☐   I do not want my real name to be used ☐

Please tick this box if you do NOT want to be featured in imagery or video footage ☐

Are there any identifying features you do NOT want included in our communications work? For example, your location or the age of your children

Please let us know if there are any ways in which you do NOT wish to be represented or described:

I am happy to give my permission
Please sign this form to show you are happy to give permission for your story to be used by [charity name] for the purposes outlined above. Your story will not be used or stored for any longer than [period of time you will use and store their story for], unless you ask us to stop using it before then.

Signature _____   Date _____

If you are under 18, we need written permission from a parent, guardian or responsible adult.

Signature of parent/guardian _____   Date _____

Data protection: The information that you provide here will only be used to contact you about sharing your story in our communications work. We will not pass the details recorded on this form on to any other organisation without your permission. We will not store your data for any longer than [period of time you will store their data].

Please return your completed form to [contact name], [job title], [charity name], [postal address]. Thank you. If you have any questions about the form, please contact [contact name] on [telephone number].

[Charity name] is a registered charity in England and Wales [include charity number] and in Scotland [include charity number], and a company limited by guarantee [include company number].

Conclusion

Every community is unique, every project is different – so every case study will be one-of-a-kind!

The practical advice and tips in this guide have hopefully given you a head-start in the planning and creating of a case study which tells your story – and some of the tools that can help along the way.

If you have any questions about this guide or have a case study to share, please get in touch with the Scottish Rural Network team via info@ruralnetwork.scot or @scotruralnet on Twitter or Facebook.

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