How to… write a learning case study

By Emma McDowell

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CULTURAL VALUE

We all learn in different ways - through our practice as much as through the evaluation that follows. But how can you communicate your own learning journey in a way that benefits others? What do you need to consider before you start developing a case study? What does an effective case study need to include?

This 'How to...' guide will help you to answer these questions, providing practical tips and guidance for writing case studies. It is designed for cultural practitioners working for organisations or independently who wish to critically reflect on and communicate key learning from their research and practice, as well as participants in the Centre for Cultural Value's Collaborate research funding scheme.

The guide is split into four sections:

1. What is a learning case study?

2. What to consider before writing your learning case study

3. What to include in your case study

4. Further reading and resources

What is a learning case study?

In the broadest sense, we write case studies to provide practical and illustrative examples from a practitioner or researcher's experience and knowledge base to inform the practice of others. Done well, they can be extremely valuable for our own development, as well as being a useful tool for sharing learning with others. In the arts and cultural sector, case studies are often used to detail what you did, and the impacts and outcomes of your specific project or practice. However, as social scientist Robert Yin (2002) suggests, case studies have particular value in exploring how and why questions, within a specific context of practice.

Learning case studies have a more specific role. Firstly, they tend to focus on the processes (the 'how' of the story), which lead to the outcomes (the 'what' or ending of the story) (Denscombe, 2010). Like evaluations, they are most effective when they are informed by critical practice. This might involve taking into account the different perspectives and experiences of our participants, audiences, communities, and partners, and/ or a more personal critical reflection on our own professional practice. But instead of providing a general overview of learning from all aspects of the projects, learning case studies clearly communicate one or two key narratives of learning and highlight how that learning might be relevant and helpful to practitioners working outside of the immediate context of the case study itself.

How does this guide work?

The guide begins with the section: **'What to consider when writing your case study'** which outlines a series of do's and 'don'ts to bear in mind when you begin writing your case study. It also includes some prompts and links to resources to support the process of critically reflecting on your practice and identifying the key learning that you are hoping to communicate. These overarching considerations are not set out in any particular order for you to follow but are designed for you to refer to throughout the process of developing your learning case study.

The next section **'What to include in your case study'** provides a series of sample headings or sections to include in your learning case study that you can refer to, or use to structure your thinking, as you progress. Throughout the guide, and in the final **'Further reading and resources'** section, we have provided links to other learning case studies and How To… Guides that you might find useful to refer to at different stages of developing your own case study.

What to consider when writing your case study

DO

Critically reflect on your practice

It can of course feel risky to share anything other than success stories. Not every cultural project will achieve the impact that it sets out to deliver all of its aims. This doesn't mean that these projects are not of value. Learning case sudies need to be framed as an experiment with 'failing well' baked in, so ensure you reflect honestly and openly about what your experiences and what you learnt, so you can create learning that can be built upon in the future.

DO

Consider who your case study is for

Who will benefit the most from the learning outlined in your case study? If your case study is for practitioners like yourselves, working in a particular context, then say so. However, you might also like to consider how you might broaden out the learning to those beyond the 'usual suspects' - such as organisations in the wider arts sector, or research professionals interested in a particular area of your work.

DON'T

Try and include everything into one case study
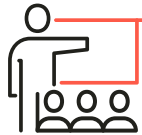
While this might be useful for you, your case study will read more like a project evaluation, instead of being a focused, directed case study of one or two key areas of learning. Choose the elements of learning you wish to share carefully. Which are the most relevant and useful? Which shed the most light on your learning journey? Avoid simply describing these: seek instead to unearth the nuggets of wisdom others may benefit from.

DON'T

Assume that the learning speaks for itself
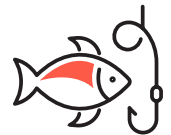
What is your case study actually about? By clearly identifying your own 'hook' or 'angle' on the learning as an individual (or organisation), you are also less likely to make the mistake of presuming that the value of your case study 'speaks for itself'. The clearer and more explicit you can be about the value of your learning for others, the better.

You might find the four steps of Kolb's (1984) learning cycle helpful in structuring your own process of critical reflection.

Start with:
1. Concrete experience [describe your experience]
2. Reflective observation [reflect on successes/failures]
3. Abstract conceptualisation [identify the learning]
4. Active experimentation [plan and try out a new way of working]

You might also find the How to... fail well guide, produced by the Failspace team, useful in further guiding you and your team in reflecting on how to better recognise, acknowledge and learn from failure.

DO

Make your case study accessible and easy to read

Layout: Your case study must be easy to read and 'scannable'. Use sub-headings and bullet points to break up the text and help the reader navigate.

Language: Address the reader directly, using the active voice where possible. Use punchy language, concise sentences and short paragraphs. Avoid jargon, abbreviations and overly specialist language. Write with an open, facilitative and approachable tone of voice. Rather than just describing what happened, include your feelings (e.g 'I was worried about...' or 'I felt excited the prospect') to really open up the journey for the reader.

Visuals: Include photos or diagrams to help to explain your thinking.

References: Include details of resources that you have found helpful or have developed as a result of your project, if you feel they might be of interest to other practitioners.

Format: While you might want to embed your case study into your organisation's webpage for easy access, consider also providing a PDF version for download. You might also want to include alternatives to the written format for your case study: for example, using video or animation as a tool for sharing a journey of learning.

DON'T

Forget to collate all your relevant information before you begin
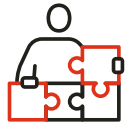
This might seem like an obvious one, but it is difficult to write a full case study if you do not have access to all the information you need. This could include anything from details of the timeline of your project or the partners or participants who were involved, to broader information such as your expectations of the project in the beginning, or your original objectives. While a case study might include examples from your own experience and knowledge base, it is more likely to be useful to others if you are able to consider the wider impacts and experiences of your project alongside your own, so ensure you talk to different people where you can.

> Consider splitting your case study into two sections, as in this case study by Birds of Paradise Theatre Company: Making Assumptions about people's access needs. The first section 'What's the story?' tells the story of what happened, when and who was involved. The second section 'What's the learning?' focuses on the how they resolved to learn from the story, and provides resources they developed as a result.
>
> This case study by Aesop on 'Knowing your own strength' includes a diagram of their planning and evaluation logic model for their Active Ingredients programme, linking to resources that readers might find helpful in their own practice.

What to include in your case study

This section of the guide provides a series of broad, sample headings or sections to include in your learning case study.

Title

Keep it short and snappy. Ideally this should introduce the reader to what the case study is about, relating to the angle or 'hook' and the key learning narrative that you explore in more depth in the case study.

Introduction

An effective way to start an introduction is with a 'pull quote' which sums up the key learning experience that you are wanting to share. This can be from a participant, or member of the project team, or can just be an extract from the case study that is particularly engaging and reflects the tone of the case study. Your introduction should be two or three sentences that summarises who you are and what the case study aims to deliver. You might also want to start your case study with bullet points of key learning, similar to that of an executive summary, so that the reader gets a sense of what to expect from the rest of the document.

Research question/ objectives

This section should briefly outline the research question or main objectives that your project was designed to address. This will enable the reader to situate your project within a wider body of research and practice. For larger projects, you could provide an overview of the broad project aims of your project, and/or you could detail specific objectives of a particular aspect of your project; whatever provides the reader with a frame of reference for the remaining detail of the case study itself.

What's the story?

This section details the process or the 'story' you want to share. You might like to frame the narrative through your initial expectations of the project, for example, and how they were changed as the project progressed. Or you might prefer a more chronological approach, where you narrate the journey as you go and how you experienced it. However you do it, ensure you choose an approach that suits your learning journey, and tells your story in an engaging and creative way. Below are a list of questions as a starting point to help guide the writing of this section.

- How does this project fit into your usual or wider practice?
- What was it about this specific approach that was innovative or experimental? What were the risks?
- What were the aims and what did you hope to achieve from the actions / activities described?
- What were you excited about? What were you scared about?
- What hurdles or crises (both practical and relational) did you meet along the way and how did you deal with them?

Managing multiple agendas and ownership in complex, large-scale projects by Clare Williams is a great example of a learning case study using a quotation at the start to draw the reader in to the context and the learning:

'My older, wiser, more cynical self would ask my buoyant, enthusiastic, younger self if I should have asked the fundamental question before this all began... Whose project is this?'

For support on developing the research questions that structure your research project, check out this How to guide on Writing Research Questions developed by Lisa Baxter.

To help guide this process in collaborative research projects, you might find the planning and framework questions in this How to... co-commission research guide by Kerry Harker.

What's the learning?

This is where you clearly communicate the lessons that you learnt along the way. You will find this section easier once you have carried out some critical reflection and evaluation of your practice, ideally with others in your team.

This is where you pick out elements of the story and consider what their learning value was for others. We have included some questions below to get you started:

- What happened? What worked as expected and what didn't? Why were there differences?
- What were the wins? What were the failures?
- Were there any 'aha' moments where something clicked for you? Any serendipitous or unexpected moments that shed light on some key learning?
- What did you have to sacrifice or compromise on to achieve the outcomes that you did?
- What do you wish you'd known at the start? How would you have done things differently? How will this impact your future work?
- How and with whom did you approach the process of critical reflection? How was that for you? What did you learn about your practice?
- And finally... so what? Why do you think this is valuable learning for others? What do you want others to learn from this story?

Additional information

Finally, your case study should include additional information and useful resources for any reader who is interested in finding out more. For example, you will want to include the biography/ies of the author/s of the case study, as well as the company background, summarising who you are and how to find out more about your work. In addition, it's good practice to also include links to related materials such as research, evidence or evaluations that informed your work, or that relate in some way to your project.

Glossary of terms

This section could also include a glossary of terms for any essential specialist terms you have used throughout your case study. Ideally, provide a description of what these terms mean in your own words.

In the How to...co-create an evaluation guide, Mark Robinson suggests an 'after action' review of a project can help to identify areas to improve and consolidate what works with different stakeholders and audiences you work with. Mark suggests five simple questions to start with:

What was supposed to happen?

What actually happened?

Why were there differences?

What have we learnt?

What does this mean for us in the future?

Further reading and resources

Examples of Learning Case Studies and How To... Guides can be found on the Centre for Cultural Value's resources page, some of which are listed below.

How to... fail well, produced by the Failspace team, is a useful resource for better recognising, acknowledging and learning from failure. Check out their website for further information on the project and tools designed for all project stages, from planning, delivery to evaluation.

How to... develop a research question, produced by Lisa Baxter, is a helpful tool for developing research questions and approaches to effectively tackle particular issues or challenges facing arts and cultural organisations.

How to... co-commission research, produced by Kerry Harker, provides practical information and reflective questions to help you develop a research project with partners. It also outlines a series of planning and framework questions you might need to consider when working collaboratively.

How to... co-create an evaluation, produced by Mark Robinson, will help you think about how every stage of your evaluation process, from planning to action to review, can be developed with the different stakeholders and audiences you work with.

Artistic leadership as community co-creation: cultural participation in Flood 2017. In this case study, members from Slung Low discuss the challenges they faced in taking on their biggest outdoor project to date.

Rising to the challenge: learning through meaningful dialogue with people and places: In this learning case study Louise Yates from Back to Ours shares her experience of delivering a large-scale production for the community, by the community. She explains how dialogue, engagement and listening to local audiences became key.

Managing risk: Lesson from staging site-specific theatre: An exploration of oil. Judith Doherty, Producer, Chief Executive and Co-Artistic Director of Grid Iron Theatre Company reflects on the challenges associated with staging site-specific theatre, and finding the balance between taking acceptable risks versus decisions that could negatively impact an organisation's future.

Working in partnership with funders to foster learning: Rachel Kingdom, Development Manager for Yorkshire Dance, shares how their recent project 'In Mature Company' can act as a template for a way of working with funders, a partnership based on open communication and ongoing dialogue.

Making assumptions about people's access needs: how we learnt from our mistake. Mairi Taylor, Executive Producer of Birds of Paradise Theatre company, reflects on how they as a company learnt from their mistake of making assumptions about people's access needs and how they developed a company-wide, universal mechanism to ensure that it would never happen again.

Knowing your own strength: Towards a more nuanced understanding of artistic outcomes in arts-in-health research. Tim Joss from Aesop shares learning from the Dance to Health programme and the role research and evaluation played in the programme itself and the learning it generated.

Upholding our commitment to art and audience: In this example, Rachael Disbury, Production Director at Alchemy Film & Arts shares how the organisation changed their approach to audience engagement, paying close attention to what wasn't working and creating more tailored approaches for engagement as a result.

Managing multiple agendas and ownership in complex, large-scale projects. Cauldrons and Furnaces / Crochan a Ffwrnais. Clare Williams reflects on managing multiple agendas and questions of ownership in complex large-scale projects.

For further reading on case study as a research method, as referenced in this guide.

- Denscombe, M. (2010) The Good Research Guide. Fourth Edition. Open University Press. (Chatper 2 'Case Studies' pp.52-64).

- Yin, R.K. (2002) Case Study Research: Design and Methods. Third Edition - Applied Social Methods Series. Sage: London

Details of Kolb's reflective cycle were based on Kolb, D.A. [1984] Experiential learning: experience as the source of learning and development. Eaglewood Cliffs: Prentice-Hall.
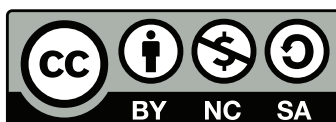
About the contributor

As a researcher and consultant, Emma is particularly interested in how notions of cultural value are articulated, communicated and enacted through arts management and policy processes, as well as the different methodologies we choose in research and evaluation activities. They have expertise in research design, qualitative and participatory co-research, as well as mixing methods. Emma worked closely with the Centre for Cultural Value to edit the series of case studies referenced in this guide. Their PhD research explores the processes of theatre-making, marketing and audience engagement in contemporary theatre practice through the enactive theoretical framing of participatory sense-making. Emma is also Social Media Editor for the international interdisciplinary journal Cultural Trends, and is Co-Chair of Red Ladder Theatre Company's board of trustees. @emmamcdoofus

Have you written a particularly effective learning case study? What did you learn? Share your reflections and learning with us at ccv@leeds.ac.uk and we'll feed this into future versions of this "How to…" guide. Or let us know if you'd like to submit a case study or contribute to a podcast or webinar on this theme.

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