



Communications is capacity

Write case studies that show your organisation's impact through stories and data



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Preface

For many non-profit organisations, communications often sits at the edge of the work—something done after programmes are implemented, reports are written, or events are completed. Yet communications is not an add-on. It is a core institutional function that connects programmes, strategy, partnerships, and public understanding of the work. When approached this way, it helps build trust, strengthen relationships with communities and funders, and ensure that efforts reach the people they are meant to serve.

Many grassroots organisations in India are doing significant work but face challenges in communicating their impact—often due to limited budgets, small teams, or the absence of structured communication systems. Developed through a partnership between Axis Bank Foundation and India Development Review (IDR), with IDR serving as the knowledge partner, this playbook is part of a series of seven that aims to provide practical, accessible guidance for organisations regardless of size or resources. Together, the playbooks are designed to walk non-profits through the essential building blocks of organisational communications.

This playbook, titled *Write case studies that show your organisation's impact through stories and data*, provides tips on how to develop strong case studies that capture programme impact.

These playbooks are not meant to be read only once or followed in a strict order. Organisations can return to them at different stages of their communications journey, using them as references while planning campaigns, documenting programmes, or strengthening internal communication systems.

At the end of each playbook, you will find short exercises and reflective prompts designed for teams to discuss together. These are meant to help organisations pause and reflect on their current practices, and consider how communications can better support their mission and goals.

Used together, these playbooks aim to help organisations treat communications not as a separate activity, but as a system that strengthens the work they already do.

Introduction

In the previous playbook, you explored how to shape your organisation’s narrative and tell stories that reflect your mission and purpose. The next step is to document those stories in ways that clearly explain how change happens.

Non-profit organisations are often asked to demonstrate their impact. Donors, partners, and communities want to understand how programmes are creating change and improving lives.

Yet many organisations stop at stating that change has occurred. The processes that enabled this change—the decisions, relationships, and actions that made progress possible—are often left unexplained. These processes are often what distinguish one organisation’s work from another operating in similar contexts.

Case studies help bridge this gap. They allow organisations to document and communicate stories of change in a credible and engaging way, grounded in the experiences of the people and communities involved. More than a report, a case study combines narrative with evidence—bringing data, context, and lived experience together to explain how change unfolded.

A well-crafted case study allows organisations to share stories of impact in a credible and engaging way, told in the voices of those who benefit most from the work.

This toolkit provides practical guidance for teams to develop strong case studies. It outlines the key elements that make case studies effective, including structure, storytelling, data, and visuals, and offers templates and examples that teams can adapt to their programmes.

How to use this playbook

This playbook is designed to move you from reflection to action.

- Read it with both programme and communications team members to develop a shared understanding of what makes a strong development case study.
- Review existing stories, reports, or case studies produced by your organisation and identify what can be strengthened using this playbook.
- Use the structure, templates, and guiding questions provided to draft or improve a case study from one of your programmes.
- Apply the learnings on field documentation, ethics, and visuals to ensure that case studies are credible, respectful, and grounded in evidence.

By the end of this section, readers should be able to:

- Understand why case studies are important for documenting programme outcomes and communicating impact.
- Recognise the key elements that make a development case study credible, identify different types of case studies, and choose an appropriate format for their organisation’s needs.
- Reflect on ethical and practical considerations when collecting stories, quotes, and visuals from the field.

I. Why case studies matter

Consider this sentence:

Our organisation has so far partnered with 100+ women's self-help groups in the tribal regions of Madhya Pradesh to create sustainable livelihoods and revive old handicraft art.

And now compare it to the paragraphs below:

Across the tribal belts of Madhya Pradesh, more than 100 women's self-help groups have revived local handicrafts once thought lost.

Two years ago, Sita Devi from Dumra village in Betul district joined a self-help group supported by our programme. The group learned to adapt traditional bamboo crafts for urban markets. With mentoring from a design school in Ahmedabad, the women created products that combined traditional techniques with modern designs, improved finishing, and learned to price and sell their work online. Sita is now a mentor in the group and has trained 40 women in both the craft and digital skills. Through this process, she began earning INR 5,000 a month, showing how support, mentoring, and market access can turn traditional skills into steady livelihoods.

Which one of the above is more effective?

The second one, hopefully.

Case studies help in

- **Building credibility:** They show what works and how it works, also capturing what *did* not work. Case studies are a great way for non-profits and community institutions to demonstrate both process, pivots and challenges, and outcomes.
- **Inspire and inform:** Stories make the work of the organisation more relatable to communities, policymakers, and the public.
- **Strengthen visibility:** A well-written case study can be used in newsletters, donor reports, and media pitches.

A strong case study brings together narrative, data, and lived experience to make change visible and understandable to different audiences.

II. What makes a strong case study

Not all stories of change make for strong case studies. In the non-profit sector, a case study is not meant to celebrate success alone. The purpose of a case study is to explain how change happened, under what conditions, and why it matters.

An effective case study combines narrative with evidence. It highlights the experiences of people and communities while clearly linking those experiences to programme intent, design, and outcomes. It is grounded in what unfolded on the ground, including challenges, course corrections and changes, and learnings from the experience.

PAUSE AND REFLECT

Does this sound familiar?

- Programme reports describe activities but not how change happened.
- Stories are shared occasionally but not documented systematically.
- Field teams collect powerful insights that never become written case studies.
- Impact stories are written mainly when donors request them.

If your response to any of these was yes, then your organisation may already be sharing stories of change. The next step is to document them more clearly, consistently, and with evidence.

Centred on people and communities

The focus of the case study is not the organisation or the programme, but the people and communities involved. The story is shaped by their experiences, decisions, and realities. The role of the organisation is explained, but it does not overshadow the voices of those affected by the intervention.

Grounded in lived experience

Compelling case studies are anchored in specific contexts and real situations. They draw on what individuals or communities experienced before the intervention, what changed over time, and how those changes were perceived by the people involved in the programme.

Linked to the programme intent and processes adopted

A case study should make it clear why a particular intervention was undertaken and how it connects to the organisation's broader goals. Actions taken on the ground are linked to intent, rather than presented as isolated activities.

Reflect on challenges and constraints

Change and social impact are rarely linear. Strong case studies should acknowledge difficulties, constraints, and instances where plans had to be adapted. This helps build credibility and allows others to learn from what did not work as expected.

Supported by data and outcomes

Narrative alone is not enough. Credible and effective case studies use simple data—for instance, numbers, timelines, or outcomes—to show scale and results. Data helps substantiate the story and makes change visible in more tangible terms.

A strong case study does more than describe success. It explains how change happened, why it mattered, and what others can learn from it.

What a strong case study is not

A strong case study is not:

- Overly long or descriptive without purpose
- Abstract or disconnected from context
- Promotional in tone
- Focused only on activities rather than outcomes
- Missing the voice of the person or community involved

III. Types of case studies

Case studies can serve different purposes depending on what an organisation wants to document and who the intended audience is.

Individual or household case studies

These focus on the experience of one person or household to illustrate change. They help readers understand how an intervention affects everyday life and are commonly used in donor communication, newsletters, and websites.

Community-level case studies

These document change at a collective level. They are particularly useful when programmes work through community institutions such as self-help groups, federations, or local governance structures.

Thematic or approach-based case studies

These focus on a specific programme model or approach and draw on examples across multiple locations. They help explain how an intervention works beyond a single case.

IV. How to structure your case study

A strong case study follows a clear structure. This helps teams organise information, maintain focus, and ensure that case studies are consistent and comparable across programmes and contexts. The structure outlined below can be used across different types of case studies.

Snapshot box

This appears at the top of the case study and provides a quick overview for the reader.

Include:

- Location (village, district, or state)
- Who the case study is about (individual, household, or community)
- Programme or intervention name
- Duration (time period of the intervention or programme)
- Key outcome (one line)

Context: The starting point

This section explains the situation before the intervention. The focus should be on conditions and context, without using language that evokes sympathy.

Include:

- Socio-economic context
- The specific issue or challenge faced by the person or community
- Why this issue matters

The challenge or the social problem

This section clearly defines what was not working and helps the reader understand the nature and scale of the challenge.

Include:

- The problem the intervention sought to address
- Barriers or constraints faced by the person or community
- Why existing solutions were insufficient, if relevant

The intervention

This section explains what the programme did and how it was implemented. Explain the actions taken and link them clearly to intent while trying to avoid jargon.

Include:

- Key actions taken as part of the intervention
- How the intervention was delivered
- Processes followed
- The role of the organisation and partners
- The role of the community or participants

The transformation

This section describes what changed as a result of the intervention. Use a combination of narrative and data to show change.

Include:

- Tangible outcomes, such as income, access, or behaviour change
- Intangible outcomes, such as confidence, agency, or decision-making
- Before-and-after contrasts

Voices from the ground

This section brings in perspectives from those directly impacted by the programme and helps ground the case study in lived experience and realities.

Include at least one quote:

- From a community member
- In first-person language
- In simple and authentic terms

What this tells us

This section reflects on learning and insight for internal teams and the wider ecosystem.

Include:

- What worked and why
- What was challenging
- What could be done differently

Looking ahead

This section closes the case study and helps position it within a longer-term process.

Include:

- What comes next for the person or community
- How change is being sustained or built on
- Any plans for scaling or continuation, where relevant

This structure is intended as a guide, not a rigid template. Teams should adapt the level of detail based on the purpose of the case study and the audience it is written for.

V. Writing style and language

The way a case study is written matters as much as what it contains. Clear language helps ensure that case studies are easy to read, accessible to different audiences, and reflect the experiences being described.

The guidelines below are meant to support consistency and clarity across case studies, without making them sound uniform or formulaic.

Voice and tone are essential elements of putting together a compelling case study.

Your **voice** is the consistent personality of your organisation. It reflects how you want to be perceived—youthful, community-centric, legacy-driven, solutions-oriented, process-oriented, or open to challenges.

Your **tone** determines how you want the audience to ‘feel’ and act. It shifts depending on what purpose the case study serves. It could convey **hope**, **urgency**, or **credibility**.

The key is to choose a tone that aligns with both your **message** and your **audience**.

Tone	Purpose	Relevant formats	Stakeholders
Hope	Use when you want to inspire belief and show the possibility of change	Impact stories, milestones	Donors, social media audiences, partners, including community partners, and internal stakeholders such as staff and teams
Urgency	When you need to mobilise people to act immediately	Campaigns, funding pitches	Social media audiences, potential donors
Credibility	When you need to build expertise and trust and demonstrate accountability	Donor communications, reports, and engagement with government stakeholders	Funders, government partners, CSR donors

Do's and Don'ts

Do

- Name the community or location where possible
- Use data to support key outcomes
- Include voices from the ground
- Be clear about challenges and constraints

Don't

- Exaggerate impact
- Use generic success language
- Write in abstract or technical terms
- Remove context to simplify the story

VI. Write a case study

Writing a strong case study works best when programme and communications teams work together. This exercise is designed to help teams apply the structure outlined in the previous sections and develop a draft case study with clarity and focus.

Use the questions below as a guide. Keep the language simple, focus on employing clear examples, and include data or quotes wherever possible.

1. Title

Write a short, action-oriented title that captures the essence of your case study.

2. Key insight

What is the single most important insight from this programme that you would like to share with the reader?

3. Background

Why was this programme needed? How did your organisation identify this specific intervention?

4. Target community

Share details about the target community with some demographic and socio-economic details.

5. About the intervention / programme

What did the programme do? Keep it short (2–3 lines). How were participants trained or supported?

6. Key partnerships

Who were the partners and what were their roles? How did partnerships strengthen the intervention?

7. Impact

What are the measurable outcomes? Include numbers, data, and participant or stakeholder quotes.

8. Key learnings

What worked well and what did not? Are there any practical lessons for others?

VII. Ethics, consent, and representation

Case studies document real people and experiences. Ethical practice is therefore essential.

Informed consent

Seek permission before collecting stories, quotes, or photographs. Participants should understand how the case study may be used.

Names, images, and quotes

Use names, photographs, and quotes only with consent. Avoid sharing identifying details where doing so could create risk.

Representation and dignity

Avoid portraying individuals as helpless or dependent. Focus instead on agency, effort, and participation.

Accuracy and accountability

Ensure that all information is accurate. Cross-check quotes, numbers, and claims before publication.

VIII. Collecting information from the field

A well-crafted case study depends on the quality of information collected from the field. Programme teams play a critical role in documenting context, change, and learning as interventions unfold.

Preparing for a field visit

Before visiting the field, be clear about the purpose of the case study and the type of information needed.

- Identify who the case study will focus on (individual, household, or community)
- Review programme objectives and expected outcomes
- Plan time for conversations, not just observation

What information to capture

Focus on capturing information that helps explain change. This could include:

- Context and background of the person or community
- Key challenges faced before the intervention
- Actions taken as part of the programme
- Changes observed over time
- Any challenges, constraints, or adjustments made

Asking questions

Use open-ended questions to encourage reflection and detailed replies, and listen carefully, allowing people time to respond in their own words.

Examples include:

- What was the situation before the programme began?
- What has changed since then?
- What has been most useful or difficult?
- What would you do differently?

Recording quotes

Record quotes accurately and in first-person language.

- Note the exact words used, without paraphrasing.

- Capture the context in which the quote was shared.
- Confirm whether the quote can be used publicly.
- Avoid rewriting quotes to make them sound more formal.

Working across teams

Information collected from the field is most useful when shared clearly with communications teams.

- Organise notes soon after the visit.
- Go over key observations, quotes, and data together.
- Flag any sensitivities or consent limitations.

XI. Visuals that strengthen a case study

What makes a useful photograph

A good field photograph adds information. It shows people in context, captures activities or processes, and reflects everyday realities. Photographs should support the narrative, not repeat it.

What to avoid

Avoid photographs that are staged, overly posed, or focused on distress. Do not use images that remove people from their context or compromise dignity or privacy.

Photographing people and communities

Seek consent before taking or using photographs, and be clear about how images may be used. Take extra care when photographing children and avoid images that make individuals clearly identifiable in situations where this could cause harm.

Captions

Captions should explain what is shown and why it matters. They should add context and avoid interpretation or repetition of the text.

Simple visuals

Simple visuals—such as maps, diagrams, or charts—can help explain location, process, or change over time. Keep visuals clear and easy to understand.

X. Sample case study

Teams can use this template as a reference while drafting their own case studies, adapting length and detail based on purpose and audience.

Supporting tribal women through bamboo crafts and sustainable livelihoods in Madhya Pradesh

Section	What to include	Example
Snapshot box	<ul style="list-style-type: none"> • Location • Who the case study is about (individual, household, or community) • Programme or intervention name • Duration • One key outcome <p>(100–120 words)</p>	<p>Location: Dumra village, Betul district, Madhya Pradesh</p> <p>Who: Female members of a self-help group</p> <p>Programme: Sustainable livelihoods through bamboo crafts</p> <p>Duration: Two years</p> <p>Key outcome: Women artisans increased their monthly incomes and revived traditional craft practices</p>
Context: The starting point	<ul style="list-style-type: none"> • Brief socio-economic context • Situation before the intervention • Key issue or challenge faced • Why this issue mattered <p>(150–200 words)</p>	<p>Betul is home to several tribal groups, including Gonds, Korkus, and Bhils, many of whom rely on subsistence farming and forest produce for their livelihoods. Literacy rates across these communities are lower than the state average, and women often face limited access to education, skill development, and income-generating opportunities due to social norms and household responsibilities. Traditional bamboo and forest-based crafts have declined due to limited market access and changing livelihoods.</p>
The challenge	<ul style="list-style-type: none"> • What was not working • Constraints or barriers faced • Gaps in existing support or solutions <p>(150–200 words)</p>	<p>-Despite strong craft skills, women struggled to adapt products for urban markets. Pricing, finishing, and access to buyers remained major barriers. Earlier efforts to sell these products in local markets generated irregular income and were difficult to sustain.</p> <p>-The intervention included a tie-up with an Ahmedabad-based design school that provided expert mentorship and trained women in market-ready craft techniques.</p>

<p>The intervention</p>	<ul style="list-style-type: none"> • What the programme did • How the intervention was implemented • Role of the organisation and partners • Role of the subject of the case study (individual, group, or community) <p>(150–200 words)</p>	<p><i>The programme paired women with design mentors and provided them with hands-on training in bamboo-based crafts. It helped them create products that appealed to urban markets and facilitated access to online and offline sales channels. By combining skill development, market connections, and ongoing support, the intervention aimed to revive traditional crafts and generate sustainable livelihoods for women and families.</i></p>
<p>The transformation</p>	<ul style="list-style-type: none"> • What changed over time: tangible outcomes (income, access, services, behaviour) • Intangible outcomes (confidence, agency, decision-making) • Before and after contrasts; simple data or evidence <p>(200–250 words)</p>	<p><i>Over two years, 40 women were trained. Members began earning an average of INR 5,000 a month from product sales. Women also reported greater confidence in pricing, decision-making, and mentoring others within the group.</i></p> <p><i>With the increase in income and agency within her family, Sita Devi, a member of the self-help group, was able to convince her family to send her 7-year-old daughter to the nearby school and pay her tuition fee.</i></p>
<p>Voice from the ground</p>	<p>One or two first-person quotes reflecting lived experience</p> <p>(50–80 words)</p>	<ul style="list-style-type: none"> • <i>“Earlier, I only made baskets for local use. Now I know how to design products that people want to buy. I earn my own income and also teach other women,” says Sita Devi.</i> • <i>According to one of the mentors, “Seeing these women transform traditional skills into market-ready products has been truly inspiring.” A programme facilitator adds, “Their confidence has grown, and families now value their contributions both financially and in household decisions.”</i>

<p>What this tells us</p>	<p>What worked and why; what was challenging; key learning or insight</p> <p>100–150 words</p>	<p><i>Targeted skill training combined with market access can revive traditional crafts and create steady livelihoods. Ongoing mentoring and time spent building community trust were critical to success.</i></p>
<p>Looking ahead</p>	<p>What comes next; how change is being sustained or built on</p> <p>80–100 words</p>	<p><i>The programme plans to expand this approach to neighbouring villages and support women artisans to access new markets. It will also ensure continued mentoring to expand the initiative in Betul.</i></p>

Quick recap

Case studies help organisations explain how change happens, and not just what activities were carried out. By combining stories, context, and data, they make programme outcomes clearer and more credible for different audiences.

What you can do next

The power of a case study lies not just in what you write, but in *whose* voice you choose to tell how you tell it.

Use the template above and draft a case study for one of your programmes.

Section	What to include	
Snapshot box	Location; who the case study is about (individual, household, or community); programme or intervention name; duration; one key outcome 100–120 words	
Context: The starting point	Brief socio-economic context; situation before the intervention; key issue or challenge faced; why this issue mattered 150–200 words	
The challenge	What was not working, constraints or barriers faced, gaps in existing support or solutions 150–200 words	
The intervention	What the programme did; how the intervention was implemented; role of the organisation and partners; role of the person, group, or community 150–200 words	
The transformation	What changed over time: tangible outcomes (income, access, services, behaviour); intangible outcomes (confidence, agency, decision-making); before and after	

	<p>contrasts; simple data or evidence</p> <p>200–250 words</p>	
Voice from the ground	<p>One or two first-person quotes reflecting lived experience</p> <p>50–80 words</p>	
What it tells us	<p>What worked and why; what was challenging; key learning or insight</p> <p>100–150 words</p>	
Looking ahead	<p>What comes next; how change is being sustained or built on</p> <p>80–100 words</p>	

Conclusion

A good case study does more than record outcomes—it tells the human story behind them.

When crafted thoughtfully, a strong case study turns impact into insight, data into dialogue, and programmes into stories of change.

For non-profit organisations, each story shared builds trust, visibility, and collective learning.

- See the playbook *Craft your organisational narrative* to learn why storytelling matters, and how can you build stories and a narrative to communicate the impact of your work
- See the playbook *Align message, audience, and channel to share multi-stakeholder organisational stories*, to understand the different communications channels and decide which ones to use to disseminate your case studies.

**KNOWLEDGE
PARTNER**

India Development Review (IDR)
