

CASE STUDY

Case studies are useful tools to communicate the details and impact of your project to people who may know nothing about it. The most successful case studies provide inspiration to fellow designers, serve as learning tools that allow others to duplicate the projects. They also serve as useful tools to shared with clients, media, and the public. This template walks you through what topics to cover—such as research, strategy and effectiveness—to demonstrate the value of design in a clear, compelling and accessible way.

After filling in these details, format all of the written and visual content in a way that communicates the story of your project in an engaging way.

**The Case Study Template
was inspired by:**

- » *Case Studies Template*, “LEAP Dialogues” (2016)
- » *Five Borroughs Farm*, Design Trust for Public Space (2014)
- » *Submit a Case Study*, ALGA’s “Design for Good” initiative (2014)
- » *Making the Case: designNYC Case Study Template*, designNYC (2012)
- » *Case Study Questionnaire*, “Designing for Social Change” (2010)

Project Summary

The first section provides readers with a brief overview of the project. It includes logistical details and important insights to help engage a spectrum of readers.

- » **Title of Project**
- » **Description of Project:** overview of the design challenge, approach, goal, and outcome and any important highlights (less than 100 words)
- » **Topic of Project:** name and describe the topic(s) that your project focused on: cultural, economic, educational, environmental, gender, health, political, social, or some topic
- » **Scale of Design:**
 - + Stand Alone Intervention: Introducing a discrete product or service.
 - + System Innovation / Activism: Altering or the creating systems to deliver a better solution.
 - + Social, Cultural, and Economic Transformation: Changing the attitudes and behaviors of a community or organization.
- » **Date and Duration**
- » **Student(s) / Designer(s):** include names, affiliations, and discipline/expertise
- » **Partner(s) / Stakeholder(s)** (include short description of each along with key people)
- » **Audience / Community** (include short description of each along with key people)
- » **Location**
- » **Budget / Compensation**

Design Process

The next section, Design Process, provides space for contributors to elaborate on the project details. We followed the general process of Research, Synthesis, Final Design, and Implement. Many discrete activities took place within that framework, from defining the challenge to designing, testing your prototype, and measuring the effectiveness. Provide details about how you worked through your project, towards the final designs.

Baseline Information (Instructor Note: students document this at an early phase of the project)
The first part of this section focuses on what you knew about the design challenge at the start of the project. This information usually comes from partnering organization or community and, while it will probably not come neatly packaged, it serves as a jumping off point to explore the challenge and provides a marker that designers can measure impact against at a later point. Baseline information can take various forms, including images of existing design elements, environments, and user experience, for example. It might also be delivered as responses to interviews from community members or users, place-based observations and assessments, or facts that provide contextual information about the challenge.

Research (Instructor Note: students document this after the research phase of the project)
Next, describe what forms of research took place and how you investigated the challenge, which should have helped you to understand and assess how to craft the design to match the desired outcome. Your research may have included the following, among other activities:

- » Reading
 - + Reading and media exploration like websites, books, case studies, articles, white papers
 - + Gathering key evidence-based insights such as behavioral findings, statistics, facts, anecdotes, initial fieldwork
- » Engagement
 - + Qualitative research like observations, shadowing, interviews, surveys, cultural probes, sensory ethnography observations and probes
 - + Learning more about key partners or community through segmentation and profiling, stakeholder identification and activities mapping that illustrate existing relationships,

- developing personas that show characters for whom the designs can be customized
 - + Descriptions of how the designer involved partners, community members, clients, end-users, stakeholders into the project; engagements with partners or community members during creative or co-creation activities; considerations of space or environment and how that improved the connecting with target audience and how that informed the challenge
 - » Prototyping
 - + Documentation of prototypes that aid in the process of discovery and ideation and that demonstrate what the final design might include. This documentation might include a summary for the prototype and demonstration of its function.
 - » Modeling
 - + Systems modeling such as mapping ecosystems, journey mapping that show normal usages of experience, service or product, comparative and competitive landscape analysis, initial business models and financial projections, systems-thinking mapping, leverage points identification, and theory of change creation.
 - » Other qualitative and quantitative research that is relevant to the project
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Synthesis of Research and Strategy for Final Design (Instructor Note: students document this after the synthesis phase of the project)

In this part, summarize what you learned from all of your research. It might be helpful to think of this as a proposal for the final design since it includes a synthesis of the research that can serve as the foundation for next approaches. It should demonstrate that you have a deep understanding of the challenge and topic and that you critically considered the range of issues that might lead to a positive impact.

The written insights that are part of this synthesis might also include artifacts like a list of principles or requirements that you developed to stay focused on the goals for your project. It might also include imagery of prototypes or models that you produced or co-designed with community members, as well as visualizations, storyboards, or videos that summarized research and chart your next steps. Those next steps might lead to outputs like visual designs, products, service or business models, or environmental or societal interventions, for example. More importantly, they should be crafted and implemented to produce specific outcomes and impacts.

Focusing on impact allows designers to align your approach with the baseline information that you learned at the start of the project along with what they discovered during your research. It also lays the foundation for how you will evaluate the outcomes of your project. If the desired impact is not clear from the research, you might want to look for more clues within your research.

The case study template also provides topic areas for potential impact that might help you focus on measuring the value of your design solution. In other words, what would success look like? In addition to outlining the observed or projected impact, consider how you will determine that impact occurs.

- » Cultural: Consider how the design solution might promote new cultural, artistic and educational opportunities.
 - + Does it acknowledge or prioritize the cultural concerns of underserved communities?
 - + Can it promote cultural diversity?
 - + Has it lead to new cross-cultural, generational, or ethnic interactions?
- » Economic: Consider how the design solution might improve the economy for your community, whether that be a town, neighborhood, organization, or group of people.
 - + Does the design solution create new jobs, increase business, provide more or services for lower cost?
 - + Does the design solution change behaviors that might be preventing community members from becoming more financially prosperous?
- » Educational: Consider how the design solution might help to educate the community on the topic of your project.
 - + Might any new educational programs start because of the design?
 - + Are the communities, stakeholders, or the end users able to use and/or adapt your designs as an advocacy tool or to educate others?
 - + How might your design solution be used as an advocacy tool?
- » Environmental: Consider how the design solution might lead to new ways of conserving energy, water or materials.
 - + Are the lifestyle habits of the community changed to become sustainable and resilient to benefit the environment?
 - + Does the design solution use recycled or sustainable materials, or find alternate ways to communicate information (converting printed materials to digital materials)?
 - + Does it extend the typical life of the artifact in some way, such as designing it to be repaired or upgraded?
 - + Is the energy required to manufacture, transport, and use the design solution reduced?
- » Gender: Consider how the design solution might increase equality between all genders.
 - + Will it lead to community members more aware of their biases might lead to inequalities?
 - + Does the design solution result in equal pay and more equitable working conditions?
 - + Does it lead to less sexual violence?
 - + Does it increase equality to education, healthcare, and jobs?
- » Health: Consider how the design solution might improve people's health.
 - + Does it promote more mindful habits?
 - + Will it help increase physical activity and mental well-being?
 - + Will healthier food be more readily available?
 - + Help with weight-loss, better eating habits and reduction of health risk indicators?
- » Political: Consider how your project might lead to a shift in policy around the issue.
 - + Could it lead to more participation in the political process?
 - + Will citizens become better informed about the issues and topics that affect them?
 - + Will more people decide to run for office?
 - + Could it lead to more collaboration between designers and policy analysts or politicians?
 - + Could laws change as a result?
- » Social: Consider how the design solution might change social dynamics in the community.
 - + Could it increase interactions, networks, activities that have strengthened the social bonds?
 - + Are there specific individual or group habits that you want your design to change in some way?

- + Do the designs elevate the needs of underserved communities?
- + Does it create a stronger emotional connection between community members?
- » Another: Please explain any combination of these or another topic area of impact.

Final Design and Implementation (Instructor Note: students document this after their design are finished and implemented phase of the project)

In this part, you should describe you final design solutions, which may have included graphics, products, structures, business models, service blueprints, or any other summary of you iterative design process. These digital and physical designs might include video / motion design, website, audio recording, posters, logo, branding guide, models, objects, physical renderings, physical computing devices, or other final outputs from the project.

In addition to describing the final design, you should provide details about how the design solution was implemented or launched. If the design was not yet launched, you should provide their strategy for implementation, which might be supported by artifacts like blueprints that provides an overview to partners, clients, and future users; service, product or design implementable requirements; timeline of implementation, roll-out for pilot testing; roles of team-member; communication strategy; collateral associated with the prototype or any other implementation details.

Impact

Describe the outcome of your project, as it compares to the baseline conditions. Why is your design effective or ineffective? Who benefited (or will benefit)? What has the reaction been from the community, partner, or client so far? To help guide your answers, consider providing both qualitative insights, quantitative data, direct and indirect results, “before and after” images, statistics, figures and facts, stories, interviews, and quotes from stakeholders. The impact could fall into one or more of the categories on the right.

Observed or Projected Impact (Instructor Note: If time, have students document this after their design are implemented and studied phase of the project)

Document the impact of your project. It could fall into one or more categories, whether they be cultural, economic, educational, environmental, gender, health, political, social, some combination of these, or some other category. See early section for more details about each section.

Reflections

Zoom out and consider all aspects of your project. This gives you a chance to elaborate on successful aspects of your process that you would repeat, but also anything you would do differently. Documenting these kinds of details implies that the project could have been better in some way. This kind of openness is counter to the enduring trend of only showing successful and beautiful projects. But reflecting in this way not only helps you grow in your abilities but will also help other designers and design students as they work on similar projects. It will also help designers become nimbler and more capable during periods of flux. Instead of only presenting our successful projects, we should critically-frame case studies by broadly communicating our design strategies, outcomes, the lessons we learned, and project impacts. The following list of question might help during this process of reflection:

- » Why your project was important
 - + Did your team focus on changing a specific behavior or having a specific impact?
 - + Did the project demonstrate gender, racial, and socio-economic diversity?
 - + How did you ensure that the client/partner/end user takes ownership of the final design in the end?
 - + What would you do anything differently if you had the chance?
 - + How has this project changed the way you work?
- » What tools, methods or frameworks helped you work through the project
 - + Did you do enough of research to confirm that design was needed to address the challenge and that your design solution and was appropriate and effective?
 - + Did the project team include enough diversity to insure the outcomes were represent the best design solution?
 - + Have you developed or utilized any particularly innovative skills, methods, or toolkits/ frameworks during this project?
 - + What were the strengths and shortcomings of your processes?
- » How might others get involved in this kind of project in the future.
 - + Can you think of any additional partnerships that will need to be established for a complete and successful implementation of the design at community, city, or industry levels?
 - + Is the design community exposed to both western and non-western design work, and from the 'Global South'?
 - + Are there innovations that can/should be scaled up?
 - + Any additional budgeting, funding, or organizational considerations?

Assets

Provide this essential content to help illustrate the story of your project. You can also use this content to design your case study. Please provide the raw files for future use along with view-ready files.

3 quotes

- » From users, partners, clients or based on interviews and/or user-testing

3 compelling statistics

- » Before/after; baseline conditions

7-10 images or illustrations of

- » Research
- » Sketches from several points/iterations during the process
- » Visual designs (print, web, environmental, motion, etc), implementation, etc

Print Files

- » Print files intended as business cards, posters, stationary, brochures, etc should be exported as "Press Quality" pdfs. If the design has imagery that bleeds off the page, please make bleeds .125 inches and add crop marks.
- » High resolution (300 dpi), Horizontal, Color
- » Caption for image
- » Image credit (e.g., "Photo: Photographer's Name" or "Source: www.websitename.com")

Digital Files

- » Images: Digital files to be used for websites, social media, etc should be exported at 72dpi as either jpg or png files (png if the files need to have a transparent background). In addition, provide a vector file (like .ai)

- » Logos: files should be customized as .ai and .png file. Provide a brief style guide that states how the identity system should and should not be used, the colors (in RGB and CMYK), typefaces (and how they are used), and any other formatting or style choices.
- » Motion: Export your motion files to a high resolution .mov or .mp4 formats. If future editing might be needed, provide the source files along with any assets that were used for the video (fonts, images, illustrations, etc)
- » Audio: Export audio files as mp3 files, minimum 192 kbps.
- » Web Design: Front End Web Design files should be made in Illustrator or Photoshop so that future website developers can measure the space between elements, assets, etc. Provide any assets as either jpg, png, or .svg files depending on what their function is. If there's any special functionality of the website (or features), please provide a text file that describes those functions and has links to any plug-ins, codes, or references that will be needed.

Guidelines

- » Provide any additional guidelines as your project requires.

Design Layout

After outlining gathering the content for your case study, in a way that communicates the story of your project in an engaging way.

While case studies have existed in non-design fields and disciplines for many years, they often appear as dry textual documents. Designers are adept at visual storytelling and should consider how to make it more engaging. After gathering the details, writing and refining the text, format the writing and visuals in a way that communicates the story of their project. Case studies are far more compelling when they combine the text with visual documentation of research and outcomes that often take the form of photography, illustrations, video stills, graphics, links to audio and video, and breakout sections that describe important details and feature meaningful statistics or quotes. Coupled with a clear and consistently applied typographic hierarchy and color pallet, this approach to crafting your case study will improve its readability, allow readers to easily scan through the document to locate details or topics that they find most interesting or relevant to their work.