

The Ultimate Guide on How to Easily Write a Nonprofit Case Study

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Introduction

Has your nonprofit executed a successful program, or have you helped people or your cause from day one, and you need to tell your constituents about it? It's time to write a case study.

A case study is a story about how your organization solved a problem or need. Maybe you executed a program among many other programs and services and you want to showcase that program, or maybe you want to write about what your nonprofit has been doing since its founding.

Well, you're in the right place.

This guide will teach you how to easily write a compelling case study, even if you're not a professional writer.

A case study can benefit your organization by affirming your current donors and constituents, encouraging your current donors to increase their donations, attracting new donors, and preparing constituents for an upcoming campaign. A case study is a story about how you cared about something and what you did about it.

You have a story. Let's tell it.

We'll use a simple story formula to put together your nonprofit's story. Here's the story formula:

A character + A Problem + A Solution = Story

You've seen this story formula in books and movies. Take the Lord of the Rings as an example.

Frodo Baggins (character) wants to destroy the ring so he can save his village from destruction and enslavement (problem), so he goes on a journey fraught with danger and risks his life to finally throw the ring into the fires of Mordor (solution) = and that's a story!

You'll put together your case study in three parts:

Part 1: Gather details

Part 2: Write your story components

Part 3: Design your case study (PDF and web page)

Each part is broken down into steps, eliminating the overwhelming feeling that can come from writing a case study. Before you know it, you'll have a gorgeous, compelling case study ready to rock your readers.

Let's get started.

Part 1: Gather details.

Step 1: Perform a simple audience analysis.

Before you start writing your case study, get to know your audience. Your audience analysis answers two questions:

- Who are you writing to?
- Why are you writing to them?

Knowing your audience helps you to decide what information should be included in your case study and what should be eliminated or rephrased.

In for-profit businesses, the purpose of a case study is to attract new clients and/or to affirm to investors that their money successfully impacted business goals. For most nonprofits, your purpose is to affirm to your current donors that their money was spent responsibly for a successful outcome, and to encourage new donors to support your cause.

Merkle

[Merkle¹](#) is an example of a for-profit company that works with nonprofits for marketing solutions. Merkle's case study about their nonprofit services includes phrases like "KPIs" and "full funnel". If you're not in marketing, then this language might be confusing. But if your job is nonprofit marketing on a large scale, then you're searching for a marketing solutions provider – like Merkle – who knows exactly what KPIs and full funnels are. Merkle knows their audience: nonprofit marketing professionals. Knowing their audience helped them answer the next question, "why are you writing to them?" Merkle wrote their case study to attract new nonprofits as clients. The case study proved to their target audience that Merkle could deliver results. Therefore, perhaps nonprofit marketing professionals should engage Merkle's services.

Your Turn

In a few sentences, write about who your audience is comprised of and what outcome this case study should (hopefully) achieve for your nonprofit. Don't worry about making it sound nice; this analysis won't be part of the final written case study, and no one will ever read your audience analysis but you.

Step 2: Gather data on the problem, solution, and results.

Find data and statistics that help your reader understand the problem you are trying to solve, the solution you chose to solve the problem, and the results of your intervention. Data backs up your claims with facts. In the case study writing phase, you will sprinkle data to add background details to your case study. Just like a story's details make the story feel real ("credible"), data adds clarity and credibility to your case study.

Ask yourself:

- What initially made you want to solve this problem?
- What drew your attention to the problem?

- How do people talk about the problem?
- Why did we choose the solution/intervention?
- How did we know the solution/intervention was successful?

Look through internal records for data, if relevant. Most likely, your organization has already collected information about the problem when you first decided to address the problem. As your program or nonprofit addressed the problem, you may have collected data along the way. [World Bicycle Relief²](#) donated bicycles to Zimbabwean girls who missed school days because of how far they had to travel to school (resulting in literacy rates that were lower than literacy rates of boys their age). World Bicycle Relief gathered some of their data on the problem, solution, and results by notes and reports from World Vision field workers.

Search online databases and news articles for data and statistics. Databases are a wealth of information, and you will likely find extra data points to support your case study story. For example, maybe your nonprofit started a food-delivery program for low-income moms who just delivered a baby through cesarean section. To find supporting data on the percentage of cesarean births compared to vaginal deliveries, you might look at statistics published by the CDC or the March of Dimes.

Your Turn

Make a brief list of data for each story component: Data about the problem, data about the intervention, and data about the solution and its results. A few data points are usually enough but collect as many as are available. You can always choose not to use a data point, but it'll be available if you need it.

Step 3: Collect quotes.

Quotes are like action and can make a long piece of writing more interesting and less intimidating to the reader. Quotes can also be “pulled” or separated into a distinct section on the page to break up long text blocks. [The McAdams Academy³](#) case study uses a few quotes from a speech by the executive director. The figure below illustrates this idea.

PART 2: THE OPPORTUNITY

A student is expelled. A youth waits for a permanent foster care placement. Neither is attending school.

How can the student receive an education while addressing the behaviors that got him expelled? How can the foster care youth move toward education and stability when he's moved from school district to school district, and sometimes no school at all?

The answer is McAdams Academy. McAdams has been an innovator in Wichita at educating high-risk youths, serving students that other schools will not.

In 2014, Chuck Knowles, PhD, developed the McAdams Academy program with Sedgwick

County Crime Prevention (SCCP) funding while he worked at Youth for Christ Wichita (YFCW). McAdams Academy Homeroom program began providing educational programming for high-risk, and moderate-risk expelled middle- and high-school students in Sedgwick County.

In 2017, an amicable arrangement between YFCW and Dr. Knowles allowed McAdams Academy to become independent of YFCW. In

2018, McAdams started working with children in the foster system.

Our program does not receive funding or help from school districts in Sedgwick County.

McAdams partners with USD 403 Otis-Bison to provide an accredited curriculum. Currently, the SCCP is still partially funding the McAdams Homeroom program.

McAdams Academy receives no funding or support from school districts in Sedgwick County.

Your Turn

Make a list of a few quotes that you could include in your case study.

Step 4: [Decide how long your case study will be.](#)

Most case studies are 2-4 pages long. If you want to add a section about your nonprofit's future plans so you can prepare for a fundraising campaign, then you can add a few pages. World Bicycle Relief's case study is four pages long. McAdams Academy's case study is nine pages long because it has a vision section to prepare for a campaign.

Your Turn

Create a one-page brand guide that includes colors, fonts, and logo. Collect photos in a file so everything is ready to use. Decide how many pages your case study will be.

Part 2: Write story components.

Now that you've gathered the bits and pieces you need to write your story, you'll start writing the case study. Write your case study by filling in the following story components:

Step 1: Introduction

Step 2: The Problem/Need

Step 3: The Opportunity (optional)

Step 4: The Solution/Intervention

Step 5: The Results/The Impact

Step 6: Optional Extras

Note: You can use these story components as section titles in your case study, or you can rename them.

Step 1: The Introduction

The Introduction is a few-sentences-long summary of your case study. Write it like you are telling a friend about the problem and how you solved it and the results and why your organization was suited to addressing the problem. Keep it short. The Introduction primes your audience for the story journey they're embarking on, but it doesn't offer extensive details. Although The Introduction comes first in your case study, write it last because your ideas and writing approach may change after you've written the main body of your case study. Just like in novels in which the story summary on the book jacket is written after the story is finished, you'll write the introduction after composing the story. When write, make sure to conform to your nonprofit's brand voice, which is the "personality" of your organization in different situations.

Your Turn

After you've written all other story components, below, return to the introduction. Write a few sentences summarizing the problem, how you solved it, and a little about your nonprofit.

Length

A few sentences

Step 2: The Problem

The Problem tells your readers what issue you are trying to solve and why it matters. In a story, you want readers to care about the character's problem or goal. You make readers care by answering the question "so what?". World Bicycle Relief wanted to solve the problem of girls missing school because of the long distances girls traveled to school. "So what if girls missed school days?" The answer is that when girls missed school, their literacy rates dropped below

that of boys their age. A drop in literacy affected future educational and employment opportunities. Now your reader cares.

You have just shown your case study reader a character with a problem:

Zimbabwean teenage girls (character) + missed school days and experienced a drop in literacy rates (problem) + which was solved by World Bicycle Relief donating bicycles (opportunity) to affected girls, resulting in fewer missed school days (solution) = story.

Your readers will care when you give them a “so what?”

[Sprinkle in data.](#)

Data backs up your claims with facts. In a story, background details enhance the reading experience by helping you imagine the scene. Data works like story background details, helping you see the problem more clearly. How much data should you include? There is no threshold for how much or how little data you need. Even one or two statistics may be enough to ground your problem/need in a factual basis. But at some point, data points can become distracting. Each data point should add something new to your story. If it doesn't, then it's probably clutter. Eliminate it. Use data to serve your story, but not to become the story. For example, McAdams Academy offers three statistics on adverse childhood events experienced by the students McAdams serves. Three statistics makes the point that expelled students have life situations that make it hard for them to behave like their peers in school. Twenty statistics about adverse childhood events wouldn't have enhanced the point, but would have been distracting and potentially overwhelming to the reader.

[Your Turn](#)

Describe your character's problem, back it up with data, and answer the “so what?” question.

[Length](#)

Several sentences to a few paragraphs

[Step 3: The Opportunity \(optional\)](#)

The Opportunity (optional): The Opportunity describes one way the problem could be solved. Some problems can be solved in more than one way, but The Opportunity outlines how you decided to best approach The Problem. World Bicycle Relief addressed the problem of girls missing school because they had to travel long distances to school. The Opportunity they chose was to provide girls with bicycles. Could they have arranged a school bus service? Or hired a ride-sharing service to pick up students? Yes, they could've done either of those things, but the organization decided to offer bicycles as the most effective and least costly option to eliminate distance from school as a factor in girls missing school days.

Sprinkle in data and statistics if you have them and if they enhance the story.

Your Turn

Write about why you chose the solution or intervention that you used to solve the problem. Sprinkle in data, if available and helpful, to back up your claims.

Length

A few sentences to a few paragraphs

Step 4: The Solution

How did you solve or improve the problem/need and why was your nonprofit the right organization to solve it?

Your case study's components have been leading up to this point: How did you solve the character's problem? How did you solve or improve the problem/need your nonprofit addresses? Well-thought-out Problem and Opportunity sections will prepare your reader to celebrate with you when you present The Solution. This is the how-to (or, rather, "how we did it") section of your case study.

Answer these questions:

- What did the nonprofit do to solve the problem/need? Use this question as a brainstorming exercise, although you don't need to plug your answer verbatim into your case study unless you want to. Here are a few examples: World Bicycle Relief donated bicycles to Zimbabwean school girls. McAdams Academy operates a school for expelled students and youth between foster care placements. Merkle offers nonprofit marketing tools. Be specific where data is available: Donated X number of bicycles, teacher-student ratio of 1:5, operated a bakery that employs homeless people and people with criminal convictions, etc.
- What were your program goals (if any)? Ask yourself, "if the program was just beginning, how would I know if this program is successful?" Program goals help you know if you've succeeded, and goals help your reader understand your solution at a glance. This is an opportunity to use bullet points and keep your writing succinct.
- Why was your organization prepared to help with the problem/need? Here's your opportunity to write about your nonprofit's history and mission and why you chose to address this problem. Why did you care about this problem?

Your Turn

Write a few sentences to a few paragraphs on how you decided to solve the problem, why you cared about the problem, what your program goals were (if you had any), and why your nonprofit was equipped to solve the problem.

Length

A few sentences to a few paragraphs

Step 5: The Results/The Impact

The Results/Impact describes the effect of your solution on who/what you were trying to aid. How did your solution fix/improve the problem? How did the solution affect the person/cause you were trying to assist?

Note: You can combine this section with The Solution component if you prefer.

Include data here whenever you can. You've brought your reader from meeting a new character, caring about his/her/its problem, and discovering the solution. The problem has been solved or improved. Frodo has destroyed the ring. Now what? Readers want to see what happened after the problem was solved. Did Frodo survive? Would The Shire remain untouched by the evil Sauron and his armies? This results/impact component is the wrap-up that makes all of the hard work worth it. This is how your readers (and donors) bask in the pleasure of aiding you in your mission. Give them results backed up with available data. You can put these results in bulleted lists so readers can easily scan it.

For example, World Bicycle Relief showed that girls with bicycles had 30% higher school passing rate than girls without bicycles.

You can include an anecdote about a person/cause who was impacted by your solution if you have enough space in your case study.

Your Turn

Write a few sentences to a few paragraphs on how your solution impacted who you were trying to help. Use data to back up your claims.

Length

A few sentences to a few paragraphs

Step 6: Optional Extras

Your case study is done. Now you have an opportunity to customize your case study.

Here are a few ideas:

Include a reference list of sources you used in the case study. Include a reference list if you used data/statistics/quotes from outside sources. A reference list can also be used to list how you gathered your own data. World Bicycle Relief explains they gathered research data from employees working in the field, and also from a previously published report.

Introduce a new initiative. If you have a program or initiative that builds on the project you've completed, then include it here. McAdams Academy concluded its case study with a vision to expand the school into a new building, and build a residential drug treatment facility as well as a residential building for youth in foster care. Even if you don't directly ask donors for money

for this initiative in the case study, it prepares them for future giving opportunities when the campaign begins.

Thank donors and explain how your organization is funded. McAdams Academy's case study includes a pie chart showing how the nonprofit is funded. It's clear from the illustration that the Academy heavily relies on donations.

Introduce your staff and board members. Include this especially if your case study presents your successes as a whole organization rather than presenting a specific program within your wider umbrella of services.

Part 3: Design your case study (print and/or online).

Now that your case study is written, it's time to make it pretty. Your PDF (and web page version) should match your nonprofit's visual branding and be attractive and easy to both read and scan. Making design decisions now will make laying out your PDF much easier.

You can design the case study PDF yourself, or use a template. Many high-quality report templates are available online or within your word processing software. If you decide to design the case study report yourself, then follow the guidelines below for lovely results.

Here's guidance on making your case study go from ho-hum text to "hello there!"

Step 1: Get your design details.

Make your case study attractive and easy to read by using simple design principles to lay out your case study in a document or on a web page. You'll design the document or web page later, after you've written the case study. For now, gather the design details in one place so you're ready to create the document.

Logo

Have your nonprofit's logo easily accessible (and in high-resolution). If you have a dark version and a light version of your logo, make sure to save both.

Note: Dark versions of logos are used on light backgrounds, such as white paper or screens, and light logo versions are used on dark backgrounds.

Make a list of your brand colors.

Using your nonprofit's brand colors and fonts in the PDF and web page version will make your case study look professional and cohesive. Also note what fonts your website uses. Try to use that font when you design your case study PDF, or find a similar font.

Collect photographs.

Photographs enhance your case study, so gather a pool of high-quality, high-resolution, relevant photos. Make sure you have permission to use photographs of other people. Generally, avoid stock photos because they look...like stock photos. Even poorly composed and arranged photographs of real people/places/things from your nonprofit will be more effective than a well-produced stock photo. Authentic over attractive is advisable.

Step 2: Design Guidelines to Create a PDF

Fonts

You should use fonts that match what's on your website, but make sure they're readable. Serif fonts (the ones with the little "feet", like Times New Roman) or sans serif fonts (clean, smooth fonts, like Arial) are good choices. Avoid cursive or highly decorative fonts. They're hard to read and will make your reader work too hard.

Font size and boldness

Set up heading styles before you lay out your case study. Heading styles start at heading 1, which is the biggest and most impactful, and descend from there. A heading level 6, for example, would draw only a little more attention than your paragraph font. Your word processing software can set up heading styles for you.

Here are some examples (choose your own fonts, sizes, and boldness since these are only examples):

Heading 1 – Use this for the title of your case study

Heading 2 – Use heading 2 for major section titles

Heading 3 – Use heading 3 for subsections under heading 2

Heading 4 – Use heading 4 for sections under heading 2

Captions – Use captions to explain the contents of photographs

Body (this example is Calibri size 11 without bold or italic) – This is the font you'll use for your paragraphs (some word processing software call paragraph style as "Normal"). This font should be easily readable and not too small.

Space between lines: Put more space between lines than you usually see as you type an ordinary paragraph in your word processing software. The space between lines is called leading. Extra leading makes your PDF easier to read and scan.

This is a paragraph with normal leading. This is a paragraph with normal leading.
This is a paragraph with normal leading. This is a paragraph with normal leading.
This is a paragraph with normal leading. This is a paragraph with normal leading.

This paragraph has extra leading. This paragraph has extra leading.
This paragraph has extra leading. This paragraph has extra leading.
This paragraph has extra leading. This paragraph has extra leading.

Margins

Include generous margins so the page doesn't appear crowded. A ½" margin is enough. One-inch margins are even better if you can afford to lose space for text.

White space

Include space between paragraphs, between text and objects, such as sidebars, photographs, and charts, so the page doesn't appear crowded and is easy to read and scan.

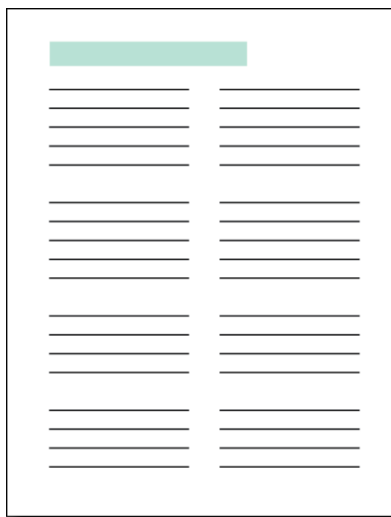
Color

Choose one or two dominant colors. Most of the time, you will choose one bold color (McAdams Academy's case study uses purple; World Bicycle Relief uses red), and the paragraph text will be black, and the background will be white (paper). Sidebars can be styled with the bold color. Also use the bold color for major headings, such as section titles.

Text Layout

Break up paragraphs into a maximum of 3-5 lines each. Break up large blocks of text into columns, or create a wider block of text next to a sidebar.

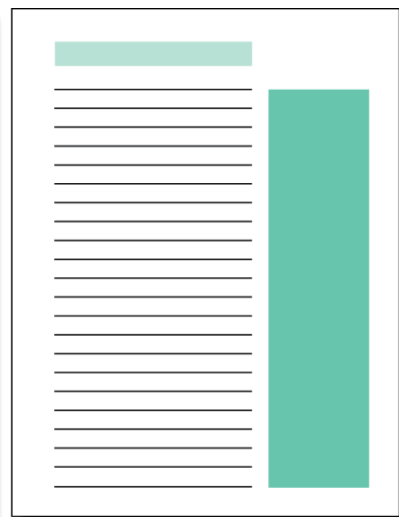
Tip: Make sure blocks of text and any sidebars, figures or photographs line up at the bottom or top, depending on orientation. Some layouts are below.



A two-column layout with a heading



A two-column layout with a heading and a placeholder for a photograph, illustration, or graphic.



A single-column layout with a heading and a sidebar.

Photographs

Include photographs when possible, but only a few. Photographs take up valuable real estate that text and other information could occupy. Use the space wisely, and make sure to add a caption and ALT text for visually-impaired people who may view your PDF online. A short case study (two pages) might not use photographs.

Logo and contact information

Make sure your logo appears in the PDF, ideally a few times. Include contact information for your nonprofit.

Proofread

Proofread your document for typos, words that are spelled correctly but are the wrong word choice (to vs too vs two), and anything that looks odd. Chances are, if it looks out of balance or strange to you, then your reader will notice, too.

Save your document

Save your document as a PDF. The PDF format can be opened without specific software, except for free Adobe Reader.

Step 3: Designing the Web-Page Version of Your Case Study PDF

All guidance for designing a printed PDF applies to the online version, but with a few important exceptions.

Heading styles

Heading styles are already built into your website and should be available in your content management system's editor. Use the built-in styles (if you've done your due diligence, then web head styles should already mostly match what you've designed for your PDF).

Text Layout

Don't use two or more text columns online. Readers will read to the bottom, then have to scroll back up to the top to finish the paragraph. This is annoying. You can create a two-column layout in which one side of the column is a photograph, illustration or sidebar, and the other side is text. Otherwise, make text fall into one column.

Break up paragraphs into three lines, or so. Readers fatigue quickly when reading online.

Note: Consider condensing your case study when presenting it online, as LinkedIn did when it presented [ASCO's case study](#)⁴: A short version with a link to the more extensive PDF version.

Good Practice

Link to your PDF from your web page so readers can choose whether to view the webpage, read the full PDF online, or download the PDF.

Check Links

If you've included links to other websites, make sure the links work.

Conclusion

You've told your story. You gathered details, wrote your story components, and made a beautiful case study in print and online. Now go out and share your story!

References

¹Merkle case study:

<https://www.merkleinc.com/thought-leadership/case-studies/vmwares-crm-focused-search-restructure-drives-more-leads-and>

²World Bicycle Relief case study:

<https://worldbicyclerelief.org/wp-content/uploads/2019/09/WBR-IGATE-Key-FIndings.pdf>

³McAdams Academy case study:

unpublished, written 2022, sent by email

⁴ASCO case study:

<https://nonprofit.linkedin.com/content/dam/me/nonprofit/case-study/asco-new-pdf.pdf>