

Guidance Text for Case Study Template

This guide has been written to support completion of the Case Study Template, which can be downloaded [here](#).

General Tips for a good project report:

- Be thorough but succinct. Tell the reader everything they need to know or signpost them directly to further resources.
- In general, keep to one initiative per case study.
- Case studies are not 'technical reports'. They should be a 'good read' – including **photos and quotes** may help with this.

Topic Area

- Identify the topic area/s that are applicable to your project.
- All topics are suitable for projects completed outside of England. Those shaded in grey align with the 12 Greener NHS (NHS England) workstreams. For more information about the workstreams, see [Delivering a 'Net Zero' National Health Service](#) report (pp.64-74)

Key message / aim

- Max 100 words
- The primary aim/goal of the project.
 - Briefly what were you trying to achieve. [e.g., Medicines contribute more than 25% of the carbon footprint (in England). We are working to improve patient care while reducing the carbon footprint through moving to low or no carbon medicines.]

What was the problem?

- Max 200 words
- Reasons / strategic choice for choosing this project - what is the problem? Why is it important?
- Use literature / other sources to support your rationale if available or to share similar research/projects.
- Also describe the context in which the change is taking place:
 - The nature of the place/population
 - Who was involved and why your team/organisation is suited to tackling the challenge



What was the solution?

- Max. 200 words
- Describe the changes you made what you did in a step-by-step manner, in sufficient detail that others may reproduce it. Concentrate on the significant features and defining characteristics rather than the process by which it came into existence. Ideally include:
 - who was involved
 - whom you engaged to achieve your change (and whom you identified would be important to involve)
 - what resources were required.
 - An overview of timeframe and staffing requirements
 - Costs: If financial investment is required, guidance regarding seeking the initial funding for the project may be helpful. Who should be approached within the local organisation? Are there opportunities to seek external funding or bursaries?

What were the challenges?

- Max. 200 words
- Detail any obstacles/drawbacks you encountered (e.g. health and safety considerations, staff training need, people's attitudes to project, logistical considerations e.g. space required, policy barriers?) –especially any unexpected ones –and how you overcame them.
- What steps were taken to engage staff and/or patients and carers with the project?
- Please also comment on any methods used for wider engagement in your organisation

What were the results/Impact?

- Max. 200 words.
- Here it is important to comment on all aspects of sustainable value, including any unintended negative impacts and strategies to avoid or minimise them.
- Give information on measures used and how data was collected where possible.
- Project your environmental (CO₂e) and financial (£) savings across a year if possible. If you are unsure how accurately your data can be projected, you may wish to project a percentage of your saving across a year.
- You may want to include graphs to illustrate your results.

Patient outcomes

- Does the initiative improve or change the standard of the care that patients receive in any way? For example, does it make their care more patient-centred, effective, or safer? Does it make their care more efficient, perhaps reducing waiting times?

Population outcomes

- Changes likely to impact on population health/ health inequalities – e.g., disease prevention, early detection or improved access to care for vulnerable groups.



Environmental impact

- The carbon footprint (expressed in Carbon Dioxide Equivalents, or CO₂e) is a common measurement used to show environmental impact. The data required to calculate a carbon footprint will depend on your project. Please download the Measuring Environmental Impact document from the SusQI webpage for more information on carbon footprinting as well as commonly used emissions factors: [Measuring Impact | Centre for Sustainable Healthcare \(susqi.org\)](https://www.susqi.org)
- Please show your workings and detail any emissions factors used, together with the source you obtained them from, in order for others to understand, replicate or compare with your results.
- Please state what you have included or excluded from your calculations, and any assumptions that you have made.
- It can be helpful to show the environmental impact in more direct ways alongside your CO₂e savings;
 - E.g., the benefits of a reduction in patient travel can be expressed in CO₂e savings, but might be more easily appreciated if also expressed in terms of the reduction in miles travelled.
 - Additional examples include the saving in waste tonnage, the number of used medical items reduced, or the amount of activity reduced (e.g. appointments).
- If you have made a reduction in item or activity use, you may also want to show this saving as a percentage (e.g. unnecessary cannulation was reduced by 66%).

Social impact

- Health services can influence the social circumstances of patients, carers, dependants, staff, local and distant communities (e.g., people working in the supply chain). It is important to consider the positive and negative impacts that may arise as a result of your project.
- Comment on impacts on the social circumstances of groups affected. e.g. time lost from education or work, impact on income or employment, relationships, participation in society, health and wellbeing
- Many green initiatives offer wider health benefits. For example, initiatives to promote active travel help to tackle obesity whilst also reducing traffic (and therefore accidents and pollution-related illnesses).
- Consider qualitative data, e.g. patient surveys or quotes from those involved/impacted by the project
- Consider quantitative data, e.g. rate of staff sickness

Financial impact

- Please document where your financial data was obtained from. Often financial information can be sourced via your organisation's procurement and estates teams. If this is not possible, then you may have to extrapolate from national data, e.g. the [British National Formulary for pharmaceuticals](#), or [PSSRU Unit Costs of Health and Social Care](#) for units of healthcare activity / staff time.
- Are there any investment costs? These can be further categorised as implementation costs (occurring only once) or ongoing maintenance costs (which will accrue year on year).



- Have any potential financial savings been identified? What type of savings are these (see page 4 <https://www.hfma.org.uk/docs/default-source/publications/nhs-efficiency-map-updated-january-2017.pdf?sfvrsn=0>)?

What were the learning points?

- Max. 200 words.
- Comment on the usefulness of the work and limitations
- What were the key elements that contributed to successes/learning in this project?
- What recommendations and advice would you give others thinking about doing similar work?

Next steps

- Max. 200 words
- What steps have been taken to ensure lasting change for beneficial aspects of the project and/or to spread learning?
- Does the organisation want to build on/expand/revise the initiative? If so, how and what does this depend on? What is it doing to ensure the initiative has a lasting effect? Is it doing anything to spread the initiative outside the organisation?
- In which other contexts could this project be relevant? How it could be spread to other contexts?
- You may also comment on any data you plan to collect on wider engagement and cultural change.

What the team and/ or patients and carers had to say

- If possible, include relevant images and quotes from people affected, whether patients, staff, stakeholders, partners, etc (keep these short).
- Please comment here and show any data of the impact of your engagement activities.

Resources and references

- Include references for any research and resources used in your project report
- Not mandatory but please do consider adding appendices of tools and resources you have used that may be helpful to others interested in replicating your project, such as a completed process map.

Want to know more?

- Please provide contact details of individuals who have contributed to the initiative. The experience and expertise of these people may make all the difference in helping another service to implement the initiative.
- Provide contact information for more than one professional, when possible, to best enable others interested in your project to successfully contact and learn from your work.

