**CHIC Hubs 2020 Case Study Template**

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### Guidelines for Completing the Case Study

CCI strives to offer high-quality case studies, and we need your help to do so. Please pay close attention to the requests for quotes, photos, graphics, and other items featured in the Case Study Materials Checklist.

 If the requested items are not attached or section are not filled out, we regretfully may be unable to publish your organization's case study on the CCI website. We encourage you to have your organization's communications team review or even help put together the package to ensure it will be featured.

* Insert your responses where you see the *purple text.*
* For images, videos, graphics, etc:
	+ Save all materials to [the Google Drive folder](https://drive.google.com/drive/u/4/folders/1oa-YfRmnT3JK149zc4fmOZZyhEstexnT), in a subfolder with your team name. Do not enter these materials directly into this content document. Insert the link where applicable
	+ Labeling practices:
		- For images: ORGANIZATION NAME\_Photo 1
		- For files: ORGANIZATION NAME\_FILE NAME
			* i.e. ORGANIZATION NAME\_Case Study Workflow
		- For images of quotees: ORGANIZATION NAME\_QUOTEE NAME
			* i. e. ORGANIZATION NAME\_Angela Liu
		- For tools: HEALTH CENTER NAME\_TOOL NAME
			* i.e. ORGANIZATION NAME\_Case Study Template

### Case Study Materials Checklist

[**Case Study Profile and Overview**](#_ql3s1uu740ho)

* [Organization Profile](#_h07tc23zt5i1) containing quick facts and summary level info about the organization and project.
* [Solution/Project Profile](#_wz5fh3me2uxw):
* [Project Timeline](#_8l4upr532hl1) with short bullet points summarizing what was done during each phase of the project (monthly or quarterly, depending on length of project).
* [Impact Metrics](#_d2mzl5j6ao7q) (3-5 key ones) you’ve collected as part of your project.
* [Project Point Person](#_n9rtwl3lvdmu) - contact information for the person that readers can reach out to if they want to learn more about the project. This will be shared on the CCI website.

[**Project Narrative Responses**](#_9vpao6q8txml)

* [The Process](#_u8exkhsff70y) descriptions of how your team worked through the problem and challenges that arose during roll-out.
* [Lessons Learned](#_p21t43bjfj65) containing 2-3 short bullet-pointed lessons learned from your project.
* [Next Steps](#_3oty4tpx9p3g) containing 5-7 short bullet-pointed next steps for your project beyond the scope of the program timeline.
* [Quotes](#_gno98otpnwpv) (3-4) from end users or other stakeholders who were impacted by the project. Quotes should include enough detail and opinion to engage the reader; a quote such as "I really like it; it worked for me" is too vague for us to use, for example. We and your readers want to know why your employees liked (or didn't like) the solution. Quotes that reveal an unexpected discovery or turning point are also good.

[**Case Study Materials and Assets**](#_767hy6z59l5r)

* [From the Vendor: Background Resources About the Solution](#_25s2e8huy9vj) Articles, videos, screenshots, demos, of solution and that vendors should be able to provide
* [From Your Project: Key Tools](#_8u5naclwrdg7) (1-3) pdfs of tools, protocols, frameworks, or other resources you created to advance your work (with your logo on them).
* [From Your Project: Visuals/Screenshots Describing Your Project](#_6dxt5f1dkwfg) (3) screenshots or images of your solution.
* [From Your Project: Images of Your Solution At Work In Your Organization](#_k08w3kaa53mg) (3) photos from your project’s implementation process or users testing the solution. Please get consents for use on CCI website from anyone whose face is visible in the photos.

Thanks! We appreciate your help.

###

### Case Study Profile and Overview

Follow the prompts to complete the section below. This information will make up a very brief profile on your project.

#### Organization Profile

|  |  |
| --- | --- |
| **Organization Name** |  |
| **Organization Website** |  |
| **Organization Description** |  |
| **About the Region** | *e.g. rural, major industry, common issues in the area, community characteristics* |
| **Patient population, size & demographics** |  |

#### Solution/Project Profile

|  |  |
| --- | --- |
| **Solution/Project Title** |  |
| **Issue** |  |
| **Stage** | *What’s the current status of the project: Select one below** ***Adopted:*** *Integrated into business operations for long term use at a single team or site*
* ***Spread:*** *Integrated into business operations for long term use across multiple teams, sites or organization-wide*
* ***Discontinued/On Hold:*** *Solution is on hold or no longer in consideration*
 |
| **Financial Investment**  | *What was the total financial investment?* |
| **CCI Investment & Support** | *What support did you receive from CCI? Please note both financial and technical assistance support.*  |
| **In-Kind Investment** | *What organizational resources invested, such as time/FTE?* |
| **Partners** | *Vendors, different departments involved, outside organizations* |

#### Project Timeline

Please share a brief outline of your project milestones or actions at each month. Focus on milestones related to the project, not the CCI benchmarks. Use short phrases (1-10 words).

|  |  |
| --- | --- |
| **Date (Month or Quarter)** | **Milestone (Short Phrases)** |
|  | *Short phrase (1-10 words)* |
|  | *Short phrase (1-10 words)* |
|  | *Short phrase (1-10 words)* |
|  | *Short phrase (1-10 words)* |
|  | *Short phrase (1-10 words)* |
|  | *Short phrase (1-10 words)* |
|  | *Short phrase (1-10 words)* |
|  | *Short phrase (1-10 words)* |

#### Impact Metrics

List 3-5 key impact measures you tracked as part of solution implementation, including how many end users participated in your experiment.

|  |  |
| --- | --- |
| **Metric 1** |  |
| **Metric 2** |  |
| **Metric 3** |  |
| **Metric 4** |  |
| **Metric 5** |  |

#### Project Point Person

*Provide contact information for the person that readers can reach out to if they want to learn more about the project. This will be shared on the CCI website.*

|  |  |
| --- | --- |
| **Name** | *Full Name* |
| **Title** | *Title* |
| **Email** | *Email* |

### Project Narrative Responses

#### The Process

Respond to the questions below in a narrative form. We want to hear how your team thought through the problem and project – successes, roadblocks, etc. Don’t hesitate to explain processes and details in depth, especially if the problem or solution is complicated. This will help the copy editor (a lay person) understand and minimize back and forth with you.

1. **Who do you need to engage? Consider end users, subject matter experts, and stakeholders (e.g., patients, clients, staff, providers)?** Describe them and their experience of the problem.

*Write your response here.*

1. **Articulate the problem:** What needs weren’t being met? How did you know your problem was a problem?

*Write your response here.*

1. **What did you hope to learn? What benchmarks did you need to meet to continue the project after the pilot?** *3-5 sentences on your assumptions before implementation and realizations after implementation.*

*Write your response here.*

1. **What was your solution and how did you bring your project to life?** Bullet point narrative describing your solution, step-by-step.

*Write your response here.*

1. **What challenges or hiccups did you face in the process?**

*Write your response here.*

1. **Results: Describe what happens when you implemented your solution.** *How was it received? What worked? What didn’t work? What surprised you about the outcome?*

*Write your response here.*

#### Lessons Learned

Share key lessons learned from your project (e.g., advice for someone else who is trying to adapt your idea). Please write in a way you would offer someone your reflections or advice about moving forward with a similar project.

1. *Lesson 1: Text*
2. *Lesson 2: Text*
3. *...*

#### Next Steps

Share 5-7 short bullet-pointed next steps for your project beyond the scope of the program timeline.

1. *Ex: Administer phone surveys regarding the mail-order pharmacy and promotional materials.*
2. *Text*
3. *Text*
4. *Text*
5. *Text*
6. *Text*
7. *Text*

#### Quotes

List at least three verbatim quotes from end users or other stakeholders who participated in the process. Quotes can be about the process of implementing your solution, about the pain points they encounter, or about how they feel about the new solution.

**Quote 1: Context of the problem**

|  |  |
| --- | --- |
| **Quote** | *Quote describing context of the problem* |
| **Quotee Full Name** | *Full Name* |
| **Quotee’s Title** | *Title* |
| **Quotee Photo** | **DO NOT upload the photo here**. Upload the photos to [your dedicated folder](https://drive.google.com/drive/u/4/folders/1gDOiPB9TtKSFX2pbMT_gYpKsnGJN0Crj) using this naming format: ORG NAME\_QUOTEE NAME. |

**Quote 2: Why the solution works/doesn’t work**

|  |  |
| --- | --- |
| **Quote #2** | *Quote describing why the solution works/doesn’t work* |
| **Quotee Full Name** | *Full Name* |
| **Quotee’s Title** | *Title* |
| **Quotee Photo** | **DO NOT upload the photo here**. Upload the photos to  [to your dedicated folder](https://drive.google.com/drive/u/4/folders/1gDOiPB9TtKSFX2pbMT_gYpKsnGJN0Crj) using this naming format: ORG NAME\_QUOTEE NAME. |

**Quote 3: About the testing/piloting process itself**

|  |  |
| --- | --- |
| **Quote #3** | *Quote about the testing/piloting process itself.* |
| **Quotee Full Name** | *Full Name* |
| **Quotee’s Title** | *Title* |
| **Quotee Photo** | **DO NOT upload the photo here**. Upload the photos to to [your dedicated folder](https://drive.google.com/drive/u/4/folders/1gDOiPB9TtKSFX2pbMT_gYpKsnGJN0Crj) using this naming format: ORG NAME\_QUOTEE NAME. |

### Case Study Materials and Assets

*Note:* ***DO NOT upload materials here****. Upload the supporting materials to the* [*”CHIC Team Submissions”*](https://drive.google.com/drive/u/4/folders/1gDOiPB9TtKSFX2pbMT_gYpKsnGJN0Crj) *folder using this naming format: ORGANIZATION NAME\_TOOL/FILE NAME.*

#### From the Vendor: Background Resources About the Solution

To help describe how a tech solution/vendor for the reader, please provide as many of the below resources you have available:

* News articles on the vendor
* Screenshots of the solution
* A “how it works” visual or video from the vendor
* Name and contact info of the vendor lead

#### From Your Project: Key Tools

Upload 1-3 tools in PDF format that were created to advance your work. Please “brand” documents with your organization name or logo.

|  |  |
| --- | --- |
| **Tool Name** | **Tool Description** |
| *Tool #1 Name* | *Description (160 characters max)* |
| *Tool #2 Name* | *Description (160 characters max)* |
| *Tool #3 Name* | *Description (160 characters max)* |

#### From Your Project: Visuals/Screenshots Describing Your Project

Upload at least 3 photos/files from your project (e.g., photos of end users in the project, workflow document, powerpoint, geographic map, technology used, data report, 3-D model, rough draft version of solution, etc).

|  |  |
| --- | --- |
| **File #1 Caption** | *1 sentence caption* |
| **File #2 Caption** | *1 sentence caption* |
| **File #3 Caption** | *1 sentence caption* |

#### From Your Project: Images of Your Solution At Work In Your Organization

[Upload at least 2](https://drive.google.com/drive/u/4/folders/1gDOiPB9TtKSFX2pbMT_gYpKsnGJN0Crj) high resolution, website worthy photos depicting the solution at work. Please get consents for use on CCI website from anyone whose face is visible in the photos.

|  |  |
| --- | --- |
| **Photo #1 Caption** | *1 sentence caption* |
| **Photo #2 Caption** | *1 sentence caption* |

*Again,* ***PLEASE DO NOT upload materials here****. Upload the tools to ”*[*CHIC Team Submissions*](https://drive.google.com/drive/u/4/folders/1gDOiPB9TtKSFX2pbMT_gYpKsnGJN0Crj)*” folder using this naming format: HEALTH CENTER NAME\_TOOL/FILE NAME.*

## Thank you! We are excited to help share your work.