

Age UK case study form

All case studies must have signed consent from the person who is sharing their story, whether they are named or not. The person should read the case study and then complete and sign the consent form.

Thank you very much for agreeing to share your story with Age UK (registered charity number 1128267) and Age UK Lancashire. Whenever this form says “we” or “us” it means these organisations. By doing this, you’re supporting the vital work that we do for people in later life.

This consent form lets you tell us **how** we can use your story. We’ll always share and store your information confidentially and securely, and we’ll give you a copy of this consent form.

Section 1: How would you like to be known when we use your story?

Tick **one box** only from these three options:

- Use my **full name** (your title, first name and surname) in the story.
- Only use my **first name** in the story.
- Use a made-up name because I prefer to remain **anonymous**.

Section 2: How do you want us to share your story?

Please tick one box each for questions (a) to (d) below. If you don’t tick a box for the questions below then we’ll assume you do **not** want us to use your story in that way. For each question, if you have chosen to remain anonymous, we’ll only share your story, not your name.

Are you happy for Age UK to share your story with organisations working for us on this project or funding the project? This will help Age UK produce reports that show the difference the project has made to people like you who have experienced it.

- Yes, I’m happy for you to share my story with this organisation.
- No, please don’t share my story with this organisation.

Section 3: Your options after you’ve shared your story with us

We may use your story as it is on the case study form, or reasonably edit or alter it.

We will always check uses of your story. By signing this form you agree to **waive** any right you might otherwise have to check or approve your story **before** we use it.

We may use your story for up to **three years** from the date of your signature below. After this date, we will confidentially and securely destroy it unless you sign a new consent form.

You can **withdraw your consent** for us to use your story **at any time** by contacting Age UK Lancashire on 0300 3031234 or by calling the project manager for Warm Homes Programme Team on 0203 033 1134. If you can't get through to Kathleen, you should call our national helpline on 0800 169 8787, quoting the name of the project for more help.

Section 4: Your details and signature

Please sign and date below so we have your permission to use your story. We also need your contact details in case we need to get in touch about using your story or identify you if you want to withdraw your consent. We'll store your details securely and confidentially and we won't use these details for anything else, including direct marketing.

Signature

I confirm that I am at least 18 years old, understand the content of this consent form and can sign it without the permission or knowledge of any other person.

Client signature: _____ Date signed: ___ / ___ / ___

Name: _____

Postcode: _____ Telephone: _____

Case study template – please complete all sections

Local Age UK / Age Cymru: Age UK Lancashire
Project this case study relates to: Information & Advice
Client Reference Number (from Charitylog or reporting template): 153801
1. About the person Say a little about them e.g. their age, if they live alone, their general well-being, if they have family or friends nearby etc
Ms W is 76 years old and lives alone. She owns her home which does not have central heating or insulation. She had been working full time and was currently in receipt of Statutory Sick Pay which was due to cease shortly. In recent months she had fallen several times and was struggling with her mobility around the home. She sometimes struggled to go out to do her food shop and a friend did this for her.
2. What was their situation? How did they come to be involved in the project or service? What was the issue they were facing and how was it affecting them?
Ms W contacted Age UK Lancashire Advice Line in September 2020. She had been advised that she could receive some financial help but she was not sure what or how to apply. She explained that she was of ill health and is finding it hard financially. A benefit check was offered and a telephone appointment booked for the 16 th October with the I&A team.
During the call she advised that she did not have central heating or insulation and she was concerned about her bills and finances, particularly when her Statutory Sick Pay ceased in a few weeks.
She also advised that she was concerned what would happen if both her and her friend were unwell and she was running short of food.
3. What did Age UK do that made a difference?
We established Mrs W was eligible to claim Attendance Allowance and she was advised to contact the Attendance Allowance Unit to request a claim form. We made an appointment with Age UK Lancashire to help with completion. At the appointment the care questions were completed based on our discussion to highlight the difficulties she was having.
As her circumstances were in a state of flux several benefit checks were carried out using the Age UK benefit calculator. This ensured she did not miss out on any benefits as her circumstances changed.
We researched the help available for the installation of central heating and loft insulation and established that she may be entitled to a grant via the Energy Company Obligation (ECO) scheme or the Green Homes Grant scheme.
We also checked her eligibility to the Warm Home Discount scheme and established her entitlement to the £140 discount under the broader group criteria.
We established that she might benefit from aids and adaptations to the home to reduce her risk of falling and help with her mobility issues. She was signposted Lancashire County Council Adult Social Care team to arrange an assessment.
Due to her limited mobility when outside we also provided advice on the Blue Badge scheme. Due to our limited capacity, she was signposted to Lancaster County Council to

help with the application. They were unable to assist with the application by phone or post. As a result, a telephone appointment with Age UK Lancashire was subsequently made to complete the online application, once resources were available.

As Mrs W was concerned that her and her friend might be unwell at the same time and she would not be able to shop for food, she was advised of the services provided by Age UK Lancashire should this situation occur.

4. What outcomes did you achieve? How has becoming involved changed their life?

Ms W had a range of queries and needs than ran beyond checking for benefits she might be entitled to. The I&A team were able to draw out those needs during the appointments, use that information to research how best she could be helped, assist in the completion of a lengthy claim form and provide details on what was available and how to claim it.

Ms W was awarded Attendance Allowance at the higher rate which immediately helped to alleviate some of her financial concerns. This has also meant she is eligible for, and in the process of claiming, Council Tax Support. When both of these are awarded she will also be eligible for the Warm Home Discount.

She was awarded the maximum grant available under the Warm Home Grant and is in the process of having her central heating and insulation installed. This has left her with sufficient funds of her own to arrange the installation of a new window not covered by the grant.

5. Quotes or feedback from the client (quotes are best!) about the difference this has made to them

“you are wonderful, a tremendous help, I did not even know all this help existed and it has been an eye-opener”