

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 (registered charity number 1142294). 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 and 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: I&A
Client Reference Number: 167958N
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
Mrs B is 66 years old and lives alone in a property which she owns. She has suffered with back problems due to traumas received and a fracture to the lower back and pelvis. She also has nerve damage to her right calf due to a torn gastrocnemius muscle. Her conditions cause her severe pain and make her feel vulnerable and sad.
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?
Due to difficulty with her personal care, Mrs B contacted Age UK Lancashire for help in completing a claim form for Attendance Allowance. We assisted with the claim form and sent it to the relevant department. We also completed a wellbeing check list and made a referral to social services for a care needs assessment. A blue badge application was completed online and a benefit check form was issued to Mrs B in order for us to carry out a calculation to check for any other benefits she may be entitled to.
3. What did Age UK do that made a difference?
Mrs B was awarded the Higher rate of Attendance Allowance. Her blue badge application was successful and she received a Blue Badge. Social services contacted her regarding a care needs assessment. Our benefit calculation confirmed Mrs B was entitled to Pension Credit and Council Tax support. She is now entitled to the Warm Home Discount under the core group due to her Pension Credit award.
4. What outcomes did you achieve? How has becoming involved changed their life?
Unclaimed benefits amounting to £8684.52 per year. Blue badge gives Mrs B much more freedom and independence. Mrs B's general wellbeing has improved. She feels more independent and not as isolated. She has more choices financially and has regular private physiotherapy.
5. Quotes or feedback from the client (quotes are best!) about the difference this has made to them
"Paula was simply brilliant, kind, patient, helpful and knowledgeable. Paula's kindness and discretion made the process so much easier. It's hard when being independent to ask for help and talk about personnel issues, medical, financial, wellbeing etc. Paula made this possible. I cannot thank you enough. I had no idea of the available help out there or any idea at all how to access help, advice or financial support. Your assistance has been brilliant. I could not, would not, have been able to complete the confusing, unclear forms, answer the questions without Paula's kind help and support. Contact with your service has completely changed my situation for the better, improving my overall wellbeing immensely. Thank you Paula"

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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.

(a) 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. For this project, these other organisations are:

Fylde Borough Council, the funder of the project, who we regularly report to on the progress of the project and the difference it’s made.

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

(b) Are you happy for us to use your story in fundraising materials? These would be used to raise money for us to enable us to continue help older people.

☒ Yes, I'm happy for Age UK and Age UK Lancashire to use my story in fundraising materials.

☐ No, please don't use my story in this way.

(c) Are you happy for us to use your story to help with our campaigning and policy work? Case studies are very useful when we try to explain to decision makers like local or national government about the issues that older people face.

☒ Yes, I'm happy for Age UK and Age UK Lancashire to use my story in this way.

☐ No, please do not use my story in this way.

(d) Are you happy for us to share your story with the media?

This means sharing your story with journalists and other people in the media who may use it or refer to it in local or national newspaper articles, on radio stations or on TV. We may also use it on Age UK or Age UK Lancashire website or on social media (including Facebook, LinkedIn or Twitter). If you've chosen to remain anonymous, we'll only share your story, not your name. If parts of your story could identify you, we'll remove these.

☐ Yes, I'm happy for Age UK and Age UK Lancashire to share my story with the media and **do** want to be contacted to discuss the details of my story further.

☐ Yes, I'm happy for Age UK and Age UK Lancashire to share my story with the media but I do **not** want to be contacted to discuss the details of my story further.

☒ No, please do not use my story in this way.

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 may use your story for up to **two 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. If you can't get through to Age UK Lancashire 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 on our database 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: _____

Address: _____

Postcode: _____ Telephone: _____

Email address: _____

Verbal consent (if required – i.e. obtained over the telephone):

Please read the below statement to the client and make note of date and time they have agreed to it:

I confirm that I am at least 18 years old, understand the content of this consent form and agree for my story to be shared as agreed within the form. I understand Age UK and Age UK Lancashire need my contact details in case they need to get in touch with me about using my story or identify me if I want to withdraw my consent. I also understand that Age UK and Age UK Lancashire will store my details securely and confidentially, and that they won't use these details for anything else, including direct marketing.

The individual provided consent to the above statement on:

Date: 28/02/2022_ Time: 16.33

Name of call handler noting the person's consent: ___Paula Fisher_

Role of call handler within organisation (e.g. I&A advisor): ___I&A Advisor___