Producing case studies

Details taken from your client’s responses to the questionnaire can be very useful in producing case studies to demonstrate the impact that your service has. Case studies can be used in:

- reports and presentations to funders, your organisation’s senior managers and trustees
- bids and tenders for future funding
- your organisation’s annual report
- presentations to clients
- service promotion materials.

If you don’t currently include case studies in reports to funders and bids or tenders, it is something definitely worth considering. Case studies add individual colour to your reports and funding bids/tenders and also help to put your service into a context that a funder or commissioner can better understand. Bear in mind that most funders and commissioners do not have specialist knowledge of advice services, so framing your work in a way that they can comprehend (i.e. through the personal experiences of clients) can have a very positive impact.

Using details from the questionnaires, possibly in conjunction with information from the client’s case file, is a great way of producing case studies. It means that you don’t have to contact and interview clients separately to produce case studies, saving time. It allows you to develop a library of case studies (or even if you don’t write up every case study, a wealth of information to produce case studies) that can be used when required rather than having to scramble around when a case study is requested. And if you are diligent in gathering case studies, you will always have up-to-date examples to demonstrate the value of what you do.

The following guidance discusses three types of case study: a detailed study of an individual client’s case; shorter illustrative or anecdotal case studies; and positive one- or two-sentence comments about your service.

Obviously, if you are going to use a client's experiences of your service as a case study you need to firstly have their consent to do so. Section 5a, ‘Case study explanation and consent text’, includes additional text that you can copy and paste into your questionnaire to ask the client for their consent. The text replaces the existing final paragraph of the question thanking the client for their time. Once you have confirmed details of the nature of the client’s
consent, be sure to keep copies of it with the questionnaire and the original case file.

Positive client comments and short/anecdotal case studies

Positive comments about your service that could be used, for example, in reports and promotional literature, can be taken from client responses to the following questions:

- Questionnaires 1 and 3 – questions 5, 7, 11, 14, 16, 19, and 20 onwards (the quality of service questions)
- Questionnaire 2 – questions 7, 9, 15, 20, 22, 28, and 29 onwards (the quality of service questions)

Examples of positive client comments

*The following examples were all taken from questionnaires completed during the piloting of the questionnaires with local Age Concerns:*

‘The adviser has helped me a lot, as I find letters very difficult, and it is good to speak to someone face to face.’

‘Age Concern was very important because I was trying hard to get things sorted out myself but I didn’t understand the forms. Since their help, I am able to sleep on a bed rather than on the sofa, and I can now cook for myself – before, I was having to go to a café for my meals, and I was washing my clothes in the sink.’

‘The adviser couldn’t have been more helpful.’

‘It was excellent to receive a home visit and I only had to wait a week.’

‘The adviser has a knack of putting things and she was able to explain them clearly.’

‘Ten out of ten … Rachel saw us through from start to finish with the benefits. She was very reassuring and explained all the terminology and processes. She did everything possible that could be done.’

‘Five stars! I couldn’t have done it without Age Concern. I cannot write, I don’t know what terminology to use on the form, don’t have the knowledge of the system that Gerry has.’
‘The adviser appeared to have all the time in the world. Such a pleasurable contrast to communicating with the local authority.’

Positive client comments can also be ‘fleshed out’ with some brief details of the enquiry to produce short case studies.

Examples of short/anecdotal case studies

This example came from one of the Age Concerns that piloted the questionnaires. It is based entirely on responses from the client recorded on questionnaire 1.

Sally had bought her council flat and, following significant repair work carried out by the local council, she received a service charge bill for several thousands of pounds.

Sally told us that she, ‘really didn’t understand the situation and what to do about it’, and, ‘I found it difficult for someone else to know about my business’.

But she knew she had to seek advice and contacted Age Concern because, ‘I was running up debts that I didn’t understand about, and couldn’t pay from my income’.

Following our intervention, Sally now receives extra Pension Credit to cover the costs of her service charge and has set up a standing order to pay the charge. Sally reported that this has really helped her peace of mind and she no longer worries about how she is going to pay the bill.

Sally didn’t feel that she had the confidence to deal with the matter herself, so we helped her with contacting the agencies and her bank and completing the forms. ‘The advice worker did the phoning, and carried out the business. They arranged everything and explained that the money would be paid by Pension Credit and then I needed to set up a Direct Debit/Standing Order. The adviser has helped me a lot, as I find letters very difficult, and it is good to speak to someone face to face.’

I&A detailed case study template

The following is a template for the sort of information to include in a detailed case study, including a structure for case studies and guidance on where to find the information for each aspect of a case study.

Client profile/background (e.g. age, partner/marital status, dependants, health and disability, race, gender, sexuality, religion, employment status,
housing status, receiving benefits, income details etc. – as appropriate to the problem experienced)

Source of information:
• case notes

**What was the problem or issue facing the client?**

Sources of information:
• case notes
• questionnaires 1, 2 and 3 – question 2

**What was the impact of this problem on the client?** (How did it affect their daily life?)

Sources of information:
• case notes
• questionnaires 1, 2 and 3 – question 2

**How did the client find out about/contact your Age UK/Age Concern?**

Sources of information:
• case notes
• questionnaires 1, 2 and 3 – question 3

**Description of the assistance provided to the client by the Age UK/Age Concern** (include details of the client’s expectations, help provided by your Age UK/Age Concern and help provided by outside agencies that the Age UK/Age Concern signposted or referred the client to)

Sources of information:
• case notes
• questionnaires 1 and 3 – questions 3 to 11
• questionnaire 2 – questions 3 to 17

**Description of the practical outcome for the client** (Has their problem been solved? If not why, what still needs to be done? What practical gain has been achieved? What’s the client’s view on this outcome?)

Sources of information:
• questionnaires 1 and 3 – questions 4 to 16
• questionnaire 2 – questions 6 to 24
• practical gains recording
Description of the impact on the client:

a.) Consequential gains from the practical outcome

Sources of information:
- questionnaires 1 and 3 – question 19
- questionnaire 2 – question 27

b.) Consequential gains from accessing the Age UK/Age Concern I&A service/the manner in which the service was provided

Sources of information:
- questionnaires 1 and 3 – question 19 and question 20 onwards (the quality of service questions)
- questionnaire 2 – questions 27, 28 and 29 onwards (the quality of service questions)

Example of detailed case study

While the following example was produced recently by a local Age UK/Age Concern, it was not produced from an outcome questionnaire. It is, however, an excellent example of a well-written case study, demonstrating the complexity of a client’s problems, the high level of expertise and support provided by an Age UK/Age Concern and both the practical and consequential benefits for the client. The complexity of the case has led to the case study being rather long; obviously a less complex case would not require this length of case study.

Mrs Jones, aged 55, contacted Age Concern by telephone to seek advice on a Disability Living Allowance (DLA) claim that her husband had made. He had just received written notification that his claim had been turned down. We invited them to come into our advice office so that we could look at the letter and discuss their options with them.

Mr Jones, aged 62, had been diagnosed with Chronic Obstructive Pulmonary Disorder and his condition constantly left him feeling breathless and fatigued. This meant that he found walking very difficult and was unable to manage a lot of his personal care tasks without assistance from his wife. We looked at the reasons why his claim had been turned down and advised that he ask for a reconsideration of the decision. We assisted the client with this process by contacting the Disability Benefit Centre and requested that they look at their decision again and take into account additional information that we assisted Mr Jones to put together.

At the time of this initial contact Mr Jones was in receipt of Statutory Sick Pay, but this was due to finish as he had recently been informed that his employer was making him redundant. After his redundancy, we assisted Mr Jones in
making an application for Incapacity Benefit. Further visits to Age Concern helped the Joneses to access other benefits like Pension Credit and Council Tax Benefit. We were also able to help them negotiate with a bailiff when they found they had accrued council tax debt because their only source of income was Mr Jones’s Statutory Sick Pay.

After a few months Mr Jones was awarded Pension Credit of £109.15 per week and Incapacity Benefit of £72.55 per week giving him and his wife a total income of £181.70, plus backdated payment of £2,410.95. They were also awarded Council Tax Benefit, which was credited to their council tax account and no further contact from the bailiff was received. They were now both entitled to help with their prescription costs, which pleased Mr Jones particularly, as he had been worried about suffering another bout of ill health because of these costs.

Mr Jones was not awarded Housing Benefit as he had originally owned the property he was now renting. Mr Jones told us that when he was the homeowner, mounting debts and the fear of repossession from the mortgage lender had led him to respond to an advertisement for a company that would purchase his property from him and then rent it back to him for £100 per week.

Mr Jones had taken an endowment mortgage on the property some 13 years earlier, and had re-mortgaged to address the resulting shortfall of £16,000. He then suffered a period of ill health and a significant reduction in his income, which had led to the difficulties he had with meeting his mortgage repayments. After contacting his former mortgage lender and having sought advice from a housing officer at the Citizens Advice Bureau, we felt that the decision not to award Housing Benefit was wrong. We advised Mr Jones that he could appeal this decision, based on the fact that he had believed (having missed some of his mortgage payments) that he had no choice but to sell his property to this company, and become a tenant rather than have his property repossessed. We also made enquiries as to whether he would be classed as intentionally homeless if he were to be evicted by his now landlord, and made arrangements for him to meet with the Housing Officer from the local council to make an application for Local Authority Housing.

We represented Mr Jones at the appeal hearing and the decision was overturned. He was awarded Housing Benefit and we were able to get it backdated to the start of his Pension Credit claim. He received back pay of £3,150.

Mr Jones’s reconsideration for DLA was turned down and so the decision was made to go an appeal tribunal. Age Concern supported Mr Jones throughout the process, contacting his GP for more supporting medical evidence and submitting further written evidence to the appeals service on his behalf.

We represented Mr Jones at the appeal tribunal and the result was a weekly DLA award of £46.75, the High Rate of Mobility plus a backdated payment of £1,075. We were also able to advise Mr Jones that he was now entitled to
exemption from road tax and a Blue Badge for disabled parking. Mr Jones commented that he would not now have to sell their car – he had originally feared that they couldn’t afford to keep it. We further discussed the possibility of adding the care component to his DLA at a later date if Mr Jones found he needed more help with his personal care.

Further to the assistance with the appeals and completion of all necessary paperwork, we discussed debt issues with Mr Jones and offered to refer him to a local specialist debt advice agency, which he duly accepted.

As a direct result of the help Mr and Mrs Jones received from Age Concern they have been able to access a range of benefits, resulting in an income of £189.35 per week plus DLA high rate mobility of £46.75. They have also benefited from the Warm Front Grant Scheme and they are now able to go out in their car, which means that Mr Jones does not have to walk as often. This reduction in physical exertion has had a positive impact on his health. They are receiving debt advice from an agency that Age Concern North referred them to, and Mr Jones tells us that he and his wife are no longer worried about losing their home and are looking forward to spending more time with their family.