

Staff Case Study Form

The aim of this form is to record client progress and outcomes in a consistent and structured way across both advocacy and advice services. It links individual client journeys to the outcomes framework used for service evaluation.

How to use this form:

- Complete one form for each client case selected for review.
- Use factual information drawn directly from case notes, client records, or structured client feedback.
- Do not rely on memory or assumptions.
- Keep language clear, neutral, and factual.
- Anonymise all responses before submission: no names, dates of birth, or other identifiable personal data should be included.

This form can be used for both advice and advocacy cases and supports internal learning, outcome tracking, service improvement, and reporting to funders where appropriate.



A. Case Profile

This section captures what the client was experiencing at the point they sought support. It is important for understanding the starting point of the client's journey and the context in which advocacy or advice was provided. Clear, factual background information helps link actions taken to the outcomes achieved later on.

- Housing or Homlessness

Benefits disoutes or appeals

Health or Social care Complaints

Safeguarding or protection from abuse

Hate crime or discrimination

Employment or education access

issues

Immigration or asylum issues

Other (please specify) _____
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Brief description of client's situation at the start:

B. Advocacy/Advice Provided

This section records what kind of support was delivered to the client. It helps document the actions taken by the advocate or adviser, providing evidence of the service's role in the client's journey. It is important to be specific and factual in noting the type of support and any key interventions.

- | | |
|---------------------------------------|--------------------------|
| Help understanding rights/options | <input type="checkbox"/> |
| Help completing forms or applications | <input type="checkbox"/> |
| Help challenging a decision | <input type="checkbox"/> |
| Help accessing services | <input type="checkbox"/> |
| Representation at meetings | <input type="checkbox"/> |
| Other (please specify) _____ | |

Brief description of client's situation at the start:

C. Outcomes Achieved (Survey-Linked)

Main issue resolved or improved:

Yes ☐ No ☐ Partially ☐ Ongoing ☐

Accessed services they were entitled to:

Yes ☐ No ☐ Not Relevant ☐

Client took independent actions:

Yes ☐ No ☐

D. Client Voice (Optional)

Short client quote or feedback:

E. Staff Reflections (Optional)

Any important observations about the client’s journey:

F. About the client

What is your age group?

- Under 18 ☐
- 18-24 ☐
- 25-34 ☐
- 35-44 ☐
- 45-54 ☐
- 55-64 ☐
- 65-74 ☐
- 75+ ☐

What is your gender?

- Male ☐
- Female ☐
- Non-binary ☐
- Prefer not to say ☐

Do you consider yourself to have a disability?

- Yes ☐
- No ☐
- Prefer not to say ☐

What is your current living situation?

- Own Home ☐
- Rented Home ☐
- Temporary Housing ☐
- Homeless/Sofa Surfing ☐
- Supported Accommodation ☐
- Other (Please Specify) ☐

How do you describe your ethnicity?

White

- English, Welsh, Scottish, Northern Irish or British ☐
- Irish ☐
- Gypsy or Irish Traveller ☐
- Roma ☐
- Any other White background (write in) ☐

Mixed or Multiple ethnic groups

- White and Black Caribbean ☐
- White and Black African ☐
- White and Asian ☐
- Any other Mixed or Multiple background (write in) ☐

Asian or Asian British

- Indian ☐
- Pakistani ☐
- Bangladeshi ☐
- Chinese ☐
- Any other Asian background (write in) ☐

Black, Black British, Caribbean or African

- Caribbean ☐
- African ☐
- Any other Black, Black British or Caribbean background (write in) ☐

Other ethnic group

- Arab ☐
- Any other ethnic group (write in) ☐