

Staff Case Study Form – Client Advocacy or Advice Outcome

Use this form to record a clear, factual account of a client's journey through your service, based on case notes. It captures the presenting issue, the support provided, and any outcomes achieved, and can be used to build a library of case studies that show how advice or advocacy and advice provision made a difference. The form also allows space for the client's voice and your own reflections, helping turn everyday casework into meaningful evidence of impact.

A. Client Profile

Age Group: _____

Gender: _____

Ethnic Background: _____

Disability Status: ☐ Yes ☐ No ☐ Prefer not to say

Living Situation:

Own home ☐

Rented home ☐

Temporary housing ☐

Homeless or sofa surfing ☐

Supported accommodation ☐

Other (please specify): _____ ☐

B. Case Background

Main issue or problem client needed support with:

Housing or accommodation issues ☐

Benefit issues or appeals ☐

Health or mental health services ☐

Safeguarding or safety concern ☐

Discrimination or hate incident ☐

Education, training or employment access ☐

Immigration or ID issues ☐

Leaving care or local authority duties ☐

Other (please specify): _____ ☐

Brief description of client's situation at the start:

C. Advocacy/Advice Provided

Support provided (tick all that apply):

Help understanding rights and options ☐

Help completing forms or applications ☐

Help challenging a decision ☐

Help accessing another service (e.g. housing, health, college) ☐

Attended or supported in meetings ☐

Other (please specify): _____ ☐

Brief notes on actions taken:

D. 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 ☐

E. Client Voice (Optional)

Short client quote or feedback:

F. Staff Reflections (Optional)

Any important observations about the client's journey: