

## Gaining consent for case studies

There are a number of potential scenarios which may be faced during the course of gathering case studies. It is important that you gain consent during this process, ensuring that those providing the content of the case study are happy for them to be used both internally and externally, and that you have permission to use their name for promotional purposes. Below are some potential scenarios that may occur and our suggestions for how to handle the consent process.

### Consent scenarios

**Walk in/verbal-** *In discussion with a library user or during a meeting a particular impact resulting from library services is mentioned.*

If appropriate ask the library user verbally if they would agree to what they have told you being written up as a case study. Write up a case study based on the information given in the discussion and send it to the user asking them if they would mind having a look at the case study in order to verify the content. Try to include quotes where possible as these are especially useful for promotional purposes. It is important to obtain consent, so ensure you ask for this using the consent wording suggested below.

**Ad-hoc (receiving written impact feedback)** - *You receive an email or an otherwise written piece of information that contains adequate information to write an impact case study.*

Write up a case study based on the information given in the discussion. You may be able to quote it directly, or may need to slightly edit if context or amalgamation or multiple comments is required. Send it to the user asking them if they would mind having a look at the case study in order to verify the content. It is important to obtain consent, so ensure you ask for this using the consent wording suggested below.

**Opportunistic** - *You identify an opportunity for a potential impact story, but do not have enough information to write your case study.*

Ask the user if they would be willing to complete a case study in order to help promote the library and knowledge service and the way in which it supports the organisation and staff. They could provide content for the case study by email, or if preferred you can offer to give them a phone call, where you can complete the case study form. If taken verbally or you make small edits or add contextual information, then you should send it to the user asking them if they would mind having a look at the case study in order to verify the content. Try to use quotes where possible as these are especially useful for promotional purposes. It is important to obtain consent to use your impact case study, so ensure you ask for this using the consent wording suggested below.

**Planned** - *You are looking to systematically gather case studies, potentially as part of a research project*

For projects such as this you should consider using the Interview Impact tools including the Interviewees consent form: <http://kfh.libraryservices.nhs.uk/value-and-impact-toolkit/kfh-impact-tools/impact-interviews/>

### Audio-Visual Recording

In cases where there is an intention to record interviews using audio or audio-visual devices, it is recommended that additional consent to this is obtained.

The consent form provided in the toolkit has been amended (August 2017) to allow for recording of consent for this process.

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### Suggested consent wording

Below is our suggested wording which can be used when gaining consent.

We would very much like to share the case study in order to promote the library and knowledge service and the way in which it supports the organisation and staff. For this reason we would like your consent in sharing the information and, ideally, providing your name as someone who has benefitted from Library Services. However if you would prefer to remain anonymous we understand.

Therefore do we have your permission to include your name on the case study? Yes/No

Please confirm that you agree to give consent for the case study to be **used internally** in relevant materials, including but not limited to reports, leaflets, training and promotional materials, which may be published in paper form or made available on the **intranet**. Yes/No

Please confirm that you agree to give consent for the case study to be **used externally** in relevant materials, including but not limited to reports, leaflets, training and promotional materials, which may be published in paper form or made widely available on the **internet including as part of a national database of case studies**. Yes/No