“How to” Guide

Welcome to your ‘Gathering real-life insights’ toolkit.

The following document provides you with information on how gathering case studies can assist you to profile the real-life impact of heart disease and stroke in the media and on your website.

This document also provides information about the contents of this toolkit, and guidance on how it can be used by you and your team members to gather local case study stories.

**Background information: why work with case studies?**

The World Heart Federation is keen to work with you to gather real-life stories from across the world, to reveal how people are affected by heart disease and stroke.

As a member of the World Heart Federation, you will already be aware of the global disease burden - an estimated 17.1 million lives claimed by cardiovascular disease (CVD) every year, 80 per cent of which occur in low- and middle-income countries. However, these are not just numbers. Behind the statistics are real people: capturing their experiences provides us with an alternative means to communicate our key messages, by giving a human face to the global fight against CVD.

These human stories can be an important component to securing media coverage and in gaining the attention of policy makers, other stakeholders and the general public. They can increase interest in and understanding of CVD by explaining the real-life experiences of how heart disease or stroke has impacted on an individual’s life or their family’s physical and emotional wellbeing. Emotive human stories can also help the reader to empathize with people with CVD and appreciate the seriousness of such conditions, thereby assisting with our advocacy efforts to build commitment and promote the actions necessary to tackle the world’s number one killer.

The benefits of working with patients are clear. The remainder of this document provides you with information on the steps to take to gather your patient’s ‘real-life insights’.

**Toolkit contents**

This toolkit provides you with the tools necessary to engage local individuals, complete interviews with them, to write up their case study account and to use their stories to engage the media.

Please find use the other four toolkit documents to support you through the process of gathering your case studies.

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These are intended as template documents only: please ensure that when working with case studies you follow your organization’s protocol and the rules and regulations applicable in your country.

1. Best practice guide

Working with patients to collect their stories should be completed in a delicate and sensitive manner. This document sets out some considerations for ‘good practice’ when working with patients, and provides guidance on how to best reach out to the media to place your case study.

2. Case study recruitment flyer

The first step of activity is to find your case studies! The flyer will help you to approach and engage individuals willing to share their story. The flyer template provides you with suggested text: please review this, amend as you feel appropriate and add in your organization’s logo, name and contact details. The copy can then be uploaded onto your website, or printed as a flyer and sent to your contacts. You may also choose to hand out the flyer at any upcoming events.

3. Interview template

Once you have been in contact with individuals willing to share their story, you will need to set up a meeting or telephone call to speak to them about their experience. This template provides guidance on the flow of the conversation and the type of questions to ask. Each case study is different: please review the questions and adapt to the conversation as you feel appropriate.

4. Case study consent form template

Once you have interviewed the individual, you need to secure their approval in writing to share their story with others. This document provides you with a template consent form to confirm the willingness of the individual to have their story published. Please edit this document to contain your organization’s details and any further requirements you might have locally. Individuals you have recruited will need to sign this before publication commences.

Please note that it should be decided at the interview stage whether the individual is willing to be filmed, photographed and named. Their choices regarding their level of involvement in activity must be respected at all times, and patients should never be pressured or persuaded to partake in activity.

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