DEPARTMENT FOR COMMUNITIES AND LOCAL GOVERNMENT

National Evaluation of the Handyperson Programme

Technical Appendix: Evaluation Tools

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AUGUST 2011
Contents

Introduction

Appendices:

Appendix A: Baseline Survey of Data Collected For Part A Funding

Appendix B: Surveys Sent To Local Authorities and Service Providers for Funding Received In 2009/10:
  o County Council Survey;
  o District Council Survey;
  o Single Tier Local Authorities Survey;
  o Service Provider Survey.

Appendix C: Surveys Sent To Local Authorities and Service Providers for Funding Received In 2010/11
  o County Council Survey;
  o District Council Local Authorities Survey;
  o Single Tier Local Authorities Survey;
  o Service Provider Survey.

Appendix D: Topic Guides Used in Case Study Interviews:
  o Key Informant Topic Guide (Part A Funding);
  o Key Informant Topic Guide (Part B Funding);
  o Handyperson Topic Guide;
  o Service User Topic Guide.
INTRODUCTION

The Department for Communities and Local Government (DCLG) introduced funding in 2009 for all local authorities in England, to develop handypersons services where they did not exist, and to build capacity in existing services. Funding of £33m was announced as part of the then-Government’s national strategy for housing in an ageing society.¹ The major part of this funding (known as “Part A” funding) comprised allocations of around £12m in 2009/10 and £17.5m in 2010/11 to enable local authorities to expand and further develop existing handyperson services or, where no such provision existed, to develop new schemes). “Part B” funding comprised allocations of between £50-200k for innovative and enhanced housing-related support services for older people. Part B funding was awarded via a competitive bidding process to 19 local authorities. In October 2010 the Coalition Government announced continued funding of £51m over 2011/15 for handypersons services²), which has been made available through Formula Grant.

THE EVALUATION OF THE HANDYPERSON PROGRAMME

Alongside the handyperson funding programme, DCLG also commissioned an independent evaluation of the services and enhanced pilots. The evaluation was undertaken by a team comprising members of the Centre for Housing Policy (CHP) and the York Health Economics Consortium (YHEC) from the University of York. The purpose of the study was to evaluate the two-year handyperson programme and enhanced pilots in terms of processes underlying the potential success of the programme, outcomes and satisfaction for service users, value-for-money and lessons for dissemination.

The evaluation of the impact of DCLG funding on the delivery of handyperson services was undertaken employing several research methods. This technical appendix presents the various tools used at different phases in the project: An additional appendix provides the detailed analysis of the data collected in the surveys completed by Local Authorities and Service Providers, and the telephone survey of service users.

The technical appendices are available from the Centre for Housing Policy website³, and the evaluation report can be accessed via the DCLG website at: http://www.communities.gov.uk/housing/housingolderpeople/

² “Housing Strategy for Older People” funding
³ http://www.york.ac.uk/cht
APPENDIX A

Baseline Survey of Data Collected For Part A Funding
BASELINE SURVEY OF DATA COLLECTED FOR PART A FUNDING

For most of the questions we are merely seeking the answers Yes or No. WE DO NOT WANT YOU TO SEND US ANY DATA AT THIS STAGE. Please tick the relevant box. Please do tell us if you don’t know the answer. If you have an example of simple form that is completed for each client, do send a blank copy to us.

You do have the opportunity at the end of the form to add some free text, e.g. about any additional data that you have collected or evaluations undertaken.

PLEASE COMPLETE A SEPARATE SURVEY FORM FOR EACH SERVICE PROVIDER

<table>
<thead>
<tr>
<th>Organisation providing handyperson services funded by Part A in your Local Authority area</th>
</tr>
</thead>
</table>

DATA ABOUT YOUR HANDYPERSON SERVICES

Can you tell us the date that the service was established?

<table>
<thead>
<tr>
<th>Yes</th>
<th></th>
<th>No</th>
<th></th>
<th>Don't Know</th>
<th></th>
</tr>
</thead>
</table>

Can you tell us the number of people appointed to deliver the service?

<table>
<thead>
<tr>
<th>Yes</th>
<th></th>
<th>No</th>
<th></th>
<th>Don't Know</th>
<th></th>
</tr>
</thead>
</table>

Can you tell us the type of people appointed to deliver the service, such as job title, ethnicity and skills?

| Yes |   | No |   | Don't Know |   |
Can you give us the costs of set up and running the service to date, broken down by staff and non-staff costs?

Yes ☐
No ☐
Don’t Know ☐

Is this service jointly funded by other organisations?

Yes ☐
No ☐
Don’t Know ☐

Do you charge clients for aspects of the services received?

Yes ☐
No ☐
Don’t Know ☐

DATA ABOUT CLIENTS WHO HAVE BENEFITTED FROM YOUR HANDYPERSON SERVICES

Do you collect data on?

The number of clients who have benefitted from the services?

Yes ☐
No ☐
Don’t Know ☐

Information about clients who have benefitted from the services, such as age, gender, ethnicity, and housing tenure?

Yes ☐
No ☐
Don’t Know ☐
Who referred the clients?

Yes ☐
No ☐
Don't Know ☐

The reason for their referral to the service

Yes ☐
No ☐
Don't Know ☐

The services received by the client, both immediate and follow-on?

Yes ☐
No ☐
Don't Know ☐

Do you hold the data on?

In an electronic format, e.g. in a database?

Yes ☐
No ☐
Don't Know ☐

In paper records only?

Yes ☐
No ☐
Don't Know ☐

Partially in electronic format and partially in paper records?

Yes ☐
No ☐
Don't Know ☐
Do you submit data to an external database such as FEMIS or Atlas?

Yes ☐
No ☐
Don’t Know ☐

EVALUATIONS

Have you undertaken:

An evaluation of the service?

Yes ☐
No ☐
Don’t Know ☐

A client satisfaction survey?

Yes ☐
No ☐
Don’t Know ☐

Please confirm you are able to provide all the above data to us for evaluation. NB your bid required to agree to submit data for the evaluation. See web link xxx

Yes ☐
No ☐
Don’t Know ☐

Please provide below the details of the contact person for the purposes of the evaluation, if not the recipient of this letter:

Contact name: ______________________________
Email address: ______________________________
Telephone: ______________________________
Website address: ______________________________
Do provide any additional information or comments as necessary below:

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MANY THANKS FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY Due Date

(You may email to yhec@york.ac.uk or fax to 01904 433620. We also have a web enabled form at (web address for form inserted)
APPENDIX B

Surveys Sent To Local Authorities and Service Providers for Funding Received In 2009/10
COUNTY COUNCIL SURVEY

Survey on CLG Part A Handyperson Services Funding:
Spend for 1st April 2009 to 31st March 2010

FOR COMPLETION BY COUNTY COUNCILS

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format
http://php.york.ac.uk/inst/yhec/?q=content/county-council-survey

All data collected will be anonymised. No individual local authority or service provider will be identified in the analysis or in reports.

SECTION 1: BACKGROUND INFORMATION

Name of Local Authority: ___________________________________

Name of person completing form: ___________________________________

Job title of person completing form: ________________________________

Email contact address of person completing form: ________________________________

Telephone number of person completing form: ________________________________

SECTION 2: INFORMATION ABOUT FUNDS

2.1 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2008/09:

£_________

2.2 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2009/10:

£_________

2.3 Spend on handyperson services in 2009/10 using only Part A funding:

£_________
2.4 Was this CLG Part A funding spend on handyperson services used by your County Council to (please tick all that apply and provide a brief description):

Increase the capacity of existing services

Increase the range and type of service offered

Set up new services

Extend services to new client groups

Extend services to new geographical areas

Maintain an existing service by replacing funding being withdrawn

Other

Did not spend the funds

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**If the CLG Part A funding spent in 2009/10 was less than the total CLG Part A funding received, please answer Question 2.5, otherwise go to Question 2.6.**
2.5 Was the underspend (please tick all that apply and describe):

Carried forward to use on handyperson services in 2010/11

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Used to support other (non-statutory) related services e.g. other Supporting People services

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Used to fund other pressures facing the council

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Other

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2.6 Was the CLG Part A funding transferred to District Councils or direct to Service Providers:

To District Councils: ☐ GO TO SECTION 3

Direct to Service Providers: ☐ GO TO SECTION 4

Did not disburse the CLG Part A Funding in 2009/10: ☐ GO TO SECTION 5

SECTION 3: INFORMATION ABOUT DISBURSEMENT OF CLG PART A FUNDS TO DISTRICT COUNCILS

3.1 Date on which CLG Part A funding was transferred to District Councils:

_________ (DD/MM/YY)

3.2 Across how many District Councils was Part A funding disbursed?

_________
3.3 Please list all District Councils in your area and the amount of funding they received. If a District Council did not receive any funding, please indicate with a zero, and add a brief explanation in the Question 3.4.

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<th>Name of District Council</th>
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3.4 Please add any comments about funding allocated to District Councils:

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SECTION 4: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO SERVICE PROVIDERS

4.1 Date on which CLG Part A funding was disbursed to Service Providers:

__________ (DD/MM/YY)

4.2 Across how many Service Providers was Part A funding disbursed?

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4.3 Please list all Service Providers in your area and the amount of funding they received:

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<thead>
<tr>
<th>Name of Service Providers</th>
<th>CLG Part A funding received</th>
<th>Total LA funding received</th>
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4.4 Please add any comments about funding allocated to Service Providers:

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SECTION 5: SUPPLEMENTARY DATA

We would be grateful if you could provide us with any of the following in whatever format suits you:

- 2009/10 activity data in electronic format (e.g. spreadsheet). NB we will provide a data protection agreement. Do not include client identifiable items such as name or address;
- 2009/10 summary data (e.g. quarterly or annual report provided to commissioners or management group);
- Any evaluations that you have undertaken in 2009/10 or earlier years;
- Any client satisfaction surveys that you have undertaken in 2009/10 or earlier years.
THANK YOU FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY:

21st May to dlw3@york.ac.uk

You can also use the security enabled web form on http://php.york.ac.uk/inst/yhec/?q=content/county-council-survey

You can also post the form, using free post to:

York Health Economics Consortium Ltd
FREEPOST YO405
University of York
Market Square
Vanbrugh Way
Heslington
YORK   YO10 5ZZ
GUIDANCE FOR COMPLETION OF THE SURVEY:
COUNTY COUNCILS

Who Should Complete this Survey?

County Councils will complete this survey.

We are assuming that County Councils have passed CLG Part A Handyperson funding to District Councils who fund the providers of handyperson services. However, there may be County Councils who fund the service providers directly.

LAs and/or service providers may also be able to provide supplementary client level data, for example via a spreadsheet, and summary reports or evaluations. Guidance is given at the end of this information sheet.

Throughout the survey where dates are referred to, please provide information in relation to the financial year.

SECTION 1: BACKGROUND INFORMATION

We require details of a contact person in the case of queries. We will also provide to the LA a summary of our survey findings.

SECTION 2: INFORMATION ABOUT USE OF FUNDS

Questions 2.1 and 2.2 We want to know how much in total was spent (from any funding sources) on handyperson services in financial years 2008/09, and 2009/10. This enables us to assess the contribution made by the CLG Part A funding to the total funding of handyperson services in individual LAs and nationally, as well as assess the changes in spend in handypersons services from year to year.

Question 2.3 We want to know how much of the CLG Part A funding was spent in the financial year 2009/10.

Question 2.4 We are interested in the various ways the CLG Part A funding was used and a brief description of each. It may have been used to enhance existing handyperson services; to establish new handyperson services (if so, we would like a brief description of these services); to extend handyperson services to new client groups, or to new geographical areas; or to replace funding that has been withdrawn. CLG Part A funding might be used for a combination of the above, in which case, please tick and describe all that apply.

Question 2.5 If not all CLG Part A funding was spent on handyperson services in 2009/10, we are interested in the ways that it was spent. Alternatively, the funding may be carried forward into 2010/11.

Question 2.6 County Councils are asked to tell us the route of the Part A funding: whether the funding was transferred to District Councils, which then funded service providers, or whether the funding was transferred directly to service providers. If funding was transferred to District Councils, then Section 3 should be completed, and Section 4 ignored. If funding was transferred direct to service providers, then Section 4 should be completed, and Section 3 ignored. If no funding was disbursed, go to Section 5.
SECTION 3: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO DISTRICT COUNCILS

Question 3.1 County Councils received their CLG Part A funding at the beginning of the financial year in 2009. However, the date that the funding was disbursed to district councils may differ. For example, we know from our baseline survey that some LAs did not disburse funds until later in the financial year 2009/10, for a variety of reasons.

Question 3.2 We wish to know across how many District Councils the CLG Part A funding was disbursed.

Question 3.3 Please list all District Councils in your area and the amount of CLG Part A handyperson funding. If a District Council did not receive any funding, please indicate with a zero, and add a brief explanation in question 3.4.

Question 3.4 We have included a comments box, so you can add any useful and additional information about the funding disbursed to service providers.

SECTION 4: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO SERVICE PROVIDERS

Question 4.1 County Councils received their CLG Part A funding at the beginning of the financial year in 2009. However, the date that the funding was transferred to service providers may differ. For example, we know from our baseline survey that some LAs did not disburse funds until later in the financial year 2009/10, for a variety of reasons.

Question 4.2 We wish to know across how many service providers the CLG Part A funding was disbursed. We are interested in whether LAs allocated the funds to many providers, or to a small number.

Question 4.3 Please provide for each service provider, their name and how much of the CLG Part A funding for 2009/10 they received, and the total LA funding they received in 2009/10 (to allow us to assess the contribution made by the CLG Part A funding.)

Question 4.4 We have included a comments box, so you can add any useful and additional information about the funding disbursed to service providers.

SECTION 5: SUPPLEMENTARY DATA

Data about Clients
Many respondents to our LA baseline survey informed us that they either submitted detailed data about clients to an external database, such as FEMIS4 or ATLAS5, or told us that they held detailed data in their own databases or spreadsheets. We would like to receive additional data about clients, whether it is held in a database or spreadsheet. Additional fields could include age, gender, and housing tenure. Some service providers may have data about the handyperson jobs, such as the activities undertaken and the length of time taken to complete a job, and whether clients have received multiple visits. We would also like to receive data about outcomes, however recorded.

4 Femis is the Foundations Electronic Management Information System. It is designed to meet the current and future information and monitoring needs of the Home Improvement Agency. Web address is http://celstore.net.
5 Atlas is the name for Anchor Trust’s Staying Put’s database, which records and manages customer and contractor information. Atlas Agency Managers and Staying Put Staff have access to the system.
Supplementary Reports
Many respondents to our LA baseline survey informed us that they had undertaken evaluations or had submitted reports to various committees. These reports are likely to be about handyperson services that are funded from sources other than the CLG Part A funding. We would welcome receipt of any of these reports, and especially any evaluation reports. We are happy to receive evaluations and client satisfaction surveys undertaken in earlier years.

Process for Receipt of Supplementary Data
We are happy to receive client data at an individual client level. All data must be anonymised. We are happy to receive data in whatever format suits the service provider/LA, such as in a database, in a spreadsheet, or in a word of pdf file. We are happy to provide a data protection document detailing our processes for managing the data. We are also happy to receive data in summary format.

You can send supplementary data to Dianne Wright on dlw3@york.ac.uk.

Any queries you might have, please do not hesitate to contact Dianne on 01904 434827
DISTRICT COUNCIL SURVEY

Survey on CLG Part A Handyperson Services Funding:
Spend for 1st April 2009 to 31st March 2010

FOR COMPLETION BY DISTRICT COUNCILS

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format
http://php.york.ac.uk/inst/yhec/?q=content/district-council-survey

All data collected will be anonymised. No individual local authority or service provider will be identified in the analysis or in reports.

SECTION 1: BACKGROUND INFORMATION

Name of Local Authority: ____________________________________________

Name of person completing form: ____________________________________

Job title of person completing form: _________________________________

Email contact address of person completing form: ______________________

Telephone number of person completing form: _________________________

SECTION 2: INFORMATION ABOUT FUNDS

2.1 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2008/09:

£________

2.2 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2009/10:

£________

2.3 Spend on handyperson services in 2009/10 using only Part A funding:

£________

THE UNIVERSITY of York
2.4 Was this CLG Part A funding spend on handyperson services used by your District Council to (please tick all that apply and provide a brief description):

- Increase the capacity of existing services
- Increase the range and type of service offered
- Set up new services
- Extend services to new client groups
- Extend services to new geographical areas
- Maintain an existing service by replacing funding being withdrawn
- Other
- Did not spend the funds

If the CLG Part A funding spent in 2009/10 was less than the total CLG Part A funding received, please answer Question 2.5, otherwise go to Section 3.

2.5 Was the underspend (please tick all that apply and describe):

- Carried forward to use on handyperson services in 2010/11
- Used to support other (non-statutory) related services e.g. other Supporting People services
Used to fund other pressures facing the council

Other

If no CLG Part A handyperson funding was spent on handyperson services in 2009/10, please go to Section 4.

SECTION 3: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO SERVICE PROVIDER

3.1 Date on which CLG Part A funding was transferred to Service Providers:

[DD/MM/YY]

3.2 Across how many Service Providers was Part A funding disbursed?


3.3 Please list all Service Providers in your area and the amount of funding they received:

<table>
<thead>
<tr>
<th>Name of Service Providers</th>
<th>CLG Part A funding received</th>
<th>Total LA funding received</th>
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Appendix B
3.4 Please add any comments about funding allocated to Service Providers:

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SECTION 4: SUPPLEMENTARY DATA

We would be grateful if you could provide us with any of the following in whatever format suits you:

- 2009/10 activity data in electronic format (e.g. spreadsheet). NB we will provide a data protection agreement. Do not include client identifiable items such as name or address;
- 2009/10 summary data (e.g. quarterly or annual report provided to commissioners or management group);
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- Any client satisfaction surveys that you have undertaken in 2009/10 or earlier years.

THANK YOU FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY:

21st May to dlw3@york.ac.uk

You can also use the security enabled web form on http://php.york.ac.uk/inst/yhec/?q=content/district-council-survey

You can also post the form, using free post to:

York Health Economics Consortium Ltd
FREEPOST YO405
University of York
Market Square
Vanbrugh Way
Heslington
YORK    YO10 5ZZ
GUIDANCE FOR COMPLETION OF THE SURVEY:
DISTRICT COUNCILS

Who Should Complete this Survey?

District Councils will complete this survey.

We are assuming that County Councils have passed CLG Part A Handyperson funding to District Councils who fund the providers of handyperson services. However, there may be County Councils who fund the service providers directly.

LAs and/or service providers may also be able to provide supplementary client level data, for example via a spreadsheet, and summary reports or evaluations. Guidance is given at the end of this information sheet.

Throughout the survey where dates are referred to, please provide information in relation to the financial year.

SECTION 1: BACKGROUND INFORMATION

We require details of a contact person in the case of queries. We will also provide to the LA a summary of our survey findings.

SECTION 2: INFORMATION ABOUT USE OF FUNDS

Questions 2.1 and 2.2 We want to know how much in total was spent (from any funding sources) on handyperson services in financial years 2008/09, and 2009/10. This enables us to assess the contribution made by the CLG Part A funding to the total funding of handyperson services in individual LAs and nationally, as well as assess the changes in spend in handyperson services from year to year.

Question 2.3 We want to know how much of the CLG Part A funding was spent in the financial year 2009/10.

Question 2.4 We are interested in the various ways the CLG Part A funding was used and a brief description of each. It may have been used to enhance existing services; to establish new services (if so, we would like a brief description of these services); to extend services to new client groups, or to new geographical areas; or to replace funding that has been withdrawn. CLG Part A funding might be used for a combination of the above, in which case, please tick and describe all that apply.

Question 2.5 If not all CLG Part A funding was spent on handyperson services in 2009/10, we are interested in the ways that it was spent. Alternatively, the funding may be carried forward into 2010/11.
SECTION 3: INFORMATION ABOUT DISBURSEMENT OF FUNDS

Question 3.1 County Councils received their CLG Part A funding at the beginning of the financial year in 2009. However, the date that the funding was disbursed to District Councils, and then on to service providers may differ. For example, we know from our baseline survey that some LAs did not disburse funds until later in the financial year 2009/10, for a variety of reasons.

Question 3.2 We wish to know across how many service providers the CLG Part A funding was disbursed. We are interested in whether LAs allocated the funds to many providers, or to a small number.

Question 3.3 Please provide for each service provider, their name and how much of the CLG Part A funding for 2009/10 they received, and the total LA funding they received in 2009/10 (to allow us to assess the contribution made by the CLG Part A funding.)

Question 3.4 We have included a comments box, so you can add any useful and additional information about the funding disbursed to service providers.

SECTION 4: SUPPLEMENTARY DATA

Data about Clients
Many respondents to our LA baseline survey informed us that they either submitted detailed data about clients to an external database, such as FEMIS⁶ or ATLAS⁷, or told us that they held detailed data in their own databases or spreadsheets. We would like to receive additional data about clients, whether it is held in a database or spreadsheet. Additional fields could include age, gender, and housing tenure. Some service providers may have data about the handyperson jobs, such as the activities undertaken and the length of time taken to complete a job, and whether clients have received multiple visits. We would also like to receive data about outcomes, however recorded.

Supplementary Reports
Many respondents to our LA baseline survey informed us that they had undertaken evaluations or had submitted reports to various committees. These reports are likely to be about handyperson services that are funded from sources other than the CLG Part A funding. We would welcome receipt of any of these reports, and especially any evaluation reports. We are happy to receive evaluations and client satisfaction surveys undertaken in earlier years.

Process for Receipt of Supplementary Data
We are happy to receive client data at an individual client level. All data must be anonymised. We are happy to receive data in whatever format suits the service provider/LA, such as in a database, in a spreadsheet, or in a word of pdf file. We are happy to provide a data protection document detailing our processes for managing the data. We are also happy to receive data in summary format.

You can send supplementary data to Dianne Wright on dlw3@york.ac.uk.

Any queries you might have, please do not hesitate to contact Dianne on 01904 434827.

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⁶ Femis is the Foundations Electronic Management Information System. It is designed to meet the current and future information and monitoring needs of the Home Improvement Agency. Web address is http://celstore.net.

⁷ Atlas is the name for Anchor Trust's Staying Put's database, which records and manages customer and contractor information. Atlas Agency Managers and Staying Put Staff have access to the system.
SINGLE TIER LOCAL AUTHORITIES SURVEY

Survey on CLG Part A Handyperson Services Funding:
Spend for 1st April 2009 to 31st March 2010

FOR COMPLETION BY SINGLE TIER LOCAL AUTHORITIES

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format
http://php.york.ac.uk/inst/yhec/?q=content/single-tier-local-authorities-survey

All data collected will be anonymised. No individual local authority or service provider will be identified in the analysis or in reports.

SECTION 1: BACKGROUND INFORMATION

Name of Local Authority: ____________________________

Name of person completing form: ____________________________

Job title of person completing form: ____________________________

Email contact address of person completing form: ____________________________

Telephone number of person completing form: ____________________________

SECTION 2: INFORMATION ABOUT FUNDS

2.1 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2008/09:

£________

2.2 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2009/10:

£________

2.3 Spend on handyperson services in 2009/10 using only Part A funding:

£________
2.4 Was this CLG Part A funding spend on handyperson services used by your LA to (please tick all that apply and provide a brief description):

- Increase the capacity of existing services
- Increase the range and type of service offered
- Set up new services
- Extend services to new client groups
- Extend services to new geographical areas
- Maintain an existing service by replacing funding being withdrawn
- Other
- Did not spend the funds

If the CLG Part A funding spent in 2009/10 was less than the total CLG Part A funding received, please answer Question 2.5, otherwise go to Section 3.

2.5 Was the underspend (please tick all that apply and describe):

- Carried forward to use on handyperson services in 2010/11
Used to support other (non-statutory) related services e.g. other Supporting People services ☐

Used to fund other pressures facing the council ☐

Other ☐

If no CLG Part A handyperson funding was spent on handyperson services in 2009/10, please go to Section 4.

SECTION 3: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO SERVICE PROVIDERS:

3.1 Date on which CLG Part A funding was transferred to service providers:

_________ (DD/MM/YY)

3.2 Across how many Service Providers was CLG Part A funding disbursed?

_________

3.3 Please list all Service Providers in your area and the amount of funding they received:

<table>
<thead>
<tr>
<th>Name of service provider</th>
<th>CLG Part A funding received</th>
<th>Total LA funding for handyperson services</th>
</tr>
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<tbody>
<tr>
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</table>
3.4 Please add any comments about funding allocated to Service Providers:

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SECTION 4: SUPPLEMENTARY DATA

We would be grateful if you could provide us with any of the following in whatever format suits you:

- 2009/10 activity data in electronic format (e.g. spreadsheet). NB we will provide a data protection agreement. Do not include client identifiable items such as name or address;
- 2009/10 summary data (e.g. quarterly or annual report provided to commissioners or management group);
- Any evaluations that you have undertaken in 2009/10 or earlier years;
- Any client satisfaction surveys that you have undertaken in 2009/10 or earlier years.

THANK YOU FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY:

21st May to dlw3@york.ac.uk

You can also use the security enabled web form on http://php.york.ac.uk/inst/yhec/?q=content/single-tier-local-authorities-survey

You can also post the form, using free post to:

York Health Economics Consortium Ltd
FREEPOST YO405
University of York
Market Square
Vanbrugh Way
Heslington
YORK YO10 5ZZ
GUIDANCE FOR COMPLETION OF THE SURVEY:
SINGLE TIER AUTHORITIES

Who Should Complete this Survey?

Single tier local authorities will complete this survey.

We are assuming that LAs have passed CLG Part A Handyperson funding direct to service providers.

LAs and/or service providers may also be able to provide supplementary client level data, for example via a spreadsheet, and summary reports or evaluations. Guidance is given at the end of this information sheet.

Throughout the survey where dates are referred to, please provide information in relation to the financial year.

SECTION 1: BACKGROUND INFORMATION

We require details of a contact person in the case of queries. We will also provide to the LA a summary of our survey findings.

SECTION 2: INFORMATION ABOUT USE OF FUNDS

Questions 2.1 and 2.2 We want to know how much in total was spent (from any funding sources) on handyperson services in financial years 2008/09, and 2009/10. This enables us to assess the contribution made by the CLG Part A funding to the total funding of handyperson services in individual LAs and nationally, as well as assess the changes in spend in handyperson services from year to year.

Question 2.3 We want to know how much of the CLG Part A funding was spent in the financial year 2009/10.

Question 2.4 We are interested in whether CLG Part A funding was used to enhance existing handyperson services; to establish new handyperson services (if so, we would like a brief description of these services); to extend handyperson services to new client groups, or to new geographical areas; or to replace funding that has been withdrawn. CLG Part A funding might be used for a combination of the above, in which case, please tick and describe all that apply.

Question 2.5 If not all CLG Part A funding was spent on handyperson services in 2009/10, we are interested in the ways that it was spent. Alternatively, the funding may have been carried forward into 2010/11.

SECTION 3: INFORMATION ABOUT DISBURSEMENT OF FUNDS

Question 3.1 LAs received their CLG Part A funding at the beginning of the financial year in 2009. However, the date that the funding was disbursed to service providers may differ. For example, we know from our baseline survey that some LAs did not disburse funds until later in the financial year 2009/10, for a variety of reasons.
Question 3.2 We wish to know across how many service providers the CLG Part A was disbursed. We are interested in whether LAs allocated the funds to many providers, or to a small number.

Question 3.3 Please provide for each service provider, their name and how much of the CLG Part A funding for 2009/10 they received, and the total LA funding they received in 2009/10 (to allow us to assess the contribution made by the CLG Part A funding.)

Question 3.4 We have included a comments box, so you can add any useful and additional information about the funding disbursed to service providers.

SECTION 4: SUPPLEMENTARY DATA

Data about Clients
Many respondents to our LA baseline survey informed us that they either submitted detailed data about clients to an external database, such as FEMIS\(^8\) or ATLAS\(^9\), or told us that they held detailed data in their own databases or spreadsheets. We would like to receive additional data about clients, whether it is held in a database or spreadsheet. Additional fields could include age, gender, and housing tenure. Some service providers may have data about the handyperson jobs, such as the activities undertaken and the length of time taken to complete a job, and whether clients have received multiple visits. We would also like to receive data about outcomes, however recorded.

Supplementary Reports
Many respondents to our LA baseline survey informed us that they had undertaken evaluations or had submitted reports to various committees. These reports are likely to be about handyperson services that are funded from sources other than the CLG Part A funding. We would welcome receipt of any of these reports, and especially any evaluation reports. We are happy to receive evaluations and client satisfaction surveys undertaken in earlier years.

Process for Receipt of Supplementary Data
We are happy to receive client data at an individual client level. All data must be anonymised. We are happy to receive data in whatever format suits the service provider/LA, such as in a database, in a spreadsheet, or in a word of pdf file. We are happy to provide a data protection document detailing our processes for managing the data. We are also happy to receive data in summary format.

You can send supplementary data to Dianne Wright on dlw3@york.ac.uk.

Any queries you might have, please do not hesitate to contact Dianne on 01904 434827.

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8 Femis is the Foundations Electronic Management Information System. It is designed to meet the current and future information and monitoring needs of the Home Improvement Agency. Web address is http://celstore.net.

9 Atlas is the name for Anchor Trust’s Staying Put’s database, which records and manages customer and contractor information. Atlas Agency Managers and Staying Put Staff have access to the system.
SERVICE PROVIDER SURVEY

Survey on CLG Part A Handyperson Services Funding: 
Spend for 1st April 2009 to 31st March 2010

THIS SURVEY CAN EITHER BE COMPLETED BY THE LOCAL AUTHORITY OR 
FORWARDED TO SERVICE PROVIDERS FOR COMPLETION.

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format
http://php.york.ac.uk/inst/yhec/?q=content/service-provider-survey

All data collected will be anonymised. No individual local authority or service provider will be 
identified in the analysis or in reports.

We require a separate survey to be completed for EACH service provider receiving CLG Part A 
handyperson funding.

SECTION A: BACKGROUND INFORMATION

1.1 Contact Details:

Name of Service Provider: ____________________________________________

Name of person completing form: ____________________________________

Job title of person completing form: __________________________________

Email contact address of person completing form: _______________________

Telephone number of person completing form: __________________________

Name of LA from which funding and survey form received: 

1.2 Please indicate whether you were an existing or new provider (in 2009/10) of 
handyperson services to the LA:

Existing service provider: ☐

New service provider: ☐
1.3 Identification of CLG Part A handyperson funding. Please select one of the three options below and choose the appropriate section of the survey to complete:

Option 1: We can identify separately the CLG Part A handyperson funding we received in 2009/10:

Yes ☐ If yes, please go to Section B of this survey.

No ☐ If no, please go to Option 2.

Option 2: We cannot identify separately the CLG Part A handyperson funding from other sources of LA funding, but we can identify the total LA funding for handyperson services we received in 2009/10:

Yes ☐ If yes, please go to Section C of this survey.

No ☐ If no, please go to Option 3.

Option 3: If neither of the above options apply, please give an explanation below, and go direct to Section D of this survey:

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SECTION B: TO BE COMPLETED BY SERVICE PROVIDERS WHO CAN IDENTIFY CLG PART A HANDYPERSON FUNDING SEPARATELY

2 Information about How CLG Part A Handyperson Funding Was Used By Service Provider

2.1 Amount of CLG Part A handyperson funding received in 2009/10:

£________

2.2 Date on which CLG Part A handyperson funding was received by service provider:

__________ (DD/MM/YY)

2.3 Amount of CLG Part A handyperson funding spent during 2009/10:

£________
2.4 If the CLG Part A handyperson funding spent in 2009/10 was less than the total CLG Part A handyperson funding received in 2009/10, please explain why:

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If no CLG Part A handyperson funding has been spent in 2009/10, please ignore the rest of Section B and go direct to Section D of this survey.

2.5 Was this CLG Part A handyperson funding used in 2009/10 to (please tick and describe all that apply):

Increase the capacity of existing services  □
.................................................................................................................................
Increase the range and type of service offered  □
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Set up new services  □
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Extend services to new client groups  □
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Extend services to new geographical areas  □
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Maintain an existing service by replacing funding being withdrawn  □
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Other  □
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Did not spend the funds  □
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2.6 Please indicate how much of the CLG Part A handyperson funding was used in 2009/10 to:

Employ handyperson staff £________
Employ clerical, administrative or management staff £________
Support volunteers £________
Contribute to overheads £________
Purchase or lease vehicles £________
Pay for running costs of vehicles £________
Purchase equipment to provide services such as tools £________
Purchase supplies and consumables for client’s homes £________
Provide training and development for staff £________
Provide training and development for volunteers £________
Pay clients direct who independently employ contractors £________
Pay subcontractors direct £________

In other ways (please explain below):
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2.7 Does this service provider charge clients for handyperson services funded (fully or partly) by CLG Part A funding?

Yes □

No □

If yes, please explain your charging policy, including eligibility criteria, fees charged and for what:
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3 Information about Staffing

3.1 How many new staff (headcount) were employed using CLG Part A handyperson funding in 2009/10?

_________

3.2 How many additional hours (i.e. new staff, and additional hours worked by existing staff) of staff time were funded using CLG Part A handyperson funding in 2009/10? (average per week)

_________

3.3 What type of additional staff were employed, or existing staff given additional hours, or, in the case of subcontractors had their contracts extended / supplemented in 2009/10 using CLG Part A handyperson funding? (Please tick all that apply)

General handyperson
Joiner
Gardener
Electrician
Plumber
Painter and Decorator
Clerical, administrative or management
Did not employ additional staff or give current staff additional hours
Paid contractors to provide services
Don’t know
Other (please describe below):

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3.4 Please describe any other changes in staffing you have made, such as providing training, enhancing skills, and changing working practices to improve effectiveness in 2009/10 as a result of the CLG Part A funding (max 100 words):


4 Information about Volunteers

4.1 How many volunteers were supported using the CLG Part A handyperson funding in 2009/10?

Headcount


Did not direct funding to volunteers (please tick)  


4.2 How many volunteers were trained using the CLG Part A handyperson funding in 2009/10?

Headcount


Did not direct funding to volunteers (please tick)  


5 Information about Clients or Households

5.1 How many clients or households were visited in 2009/10 as a result of the CLG Part A handyperson funding received?


Appendix B  xxvii
If no clients or households were seen as a result of the CLG Part A handyperson funding received, please explain below, and then go to Question 6.1:

5.2 From which of the following sources were these additional clients or households referred and how many were referred? (Please tick all that apply, and give number)

- Self referral
- Via police and local crime prevention initiative
- From a community health worker
- From an acute hospital service
- Via an Older Person Advocacy Service, such as Age Concern
- From Social Care Services
- Via the Fire Service
- Via a relative or friend
- Did not have any additional clients through this source of funding
- Unable to provide this data
- Other (please describe below):

5.3 To which of the following groups was the CLG Part A handyperson funding directed (please tick all that apply and if applicable, give criteria):

- Any older person
6 Information about Activities

6.1 To which of the following activities was the CLG Part A handyperson funding directed (please tick all that apply):

- Small repairs
- Home security improvements
- Minor adaptations
- Hospital discharge
- Energy efficiency improvements
- Gardening
- Fire safety improvements
- Home safety checks
- Falls prevention
- Unable to provide this data
- Other (please describe below):
6.2 How many additional clients or households benefited from the following activities using the CLG Part A handyperson funding? (Please provide number):

- Small repairs
- Home security improvements
- Minor adaptations
- Hospital discharge
- Energy efficiency improvements
- Gardening
- Fire safety improvements
- Home safety checks
- Falls prevention
- Unable to provide this data
- None
- Other (please describe below):

7 Other Information

Please provide any other information that you feel is relevant or helpful to the evaluation (maximum 100 words):

If you have completed Section B, please go to Section D of this survey.
SECTION C: TO BE COMPLETED BY SERVICE PROVIDERS WHO CANNOT SEPARATE CLG PART A HANDYPEOPLE FUNDING FROM THE TOTAL LA HANDYPERSO FUNDING RECEIVED

2 Information about How Total LA Funding was Spent By Service Provider

2.1 Amount of LA handyperson funding received in 2008/09:

£________

2.2 Amount of LA handyperson funding received in 2009/10:

£________

2.3 Date on which LA handyperson funding was received by service provider in 2009/10:

__________ (DD/MM/YY)

2.4 Amount of LA handyperson funding spent during 2009/10:

£________

If no LA handyperson funding has been spent in 2009/10, please ignore the rest of Section C and go direct to Section D of this survey.

2.5 Was this LA funding used by your organisation in 2009/10 to (please tick and describe all that apply):

Increase the capacity of existing services

Increase the range and type of service offered

Set up new services

Extend services to new client groups
Extend services to new geographical areas
☐

Maintain an existing service by replacing funding being withdrawn
☐

Other
☐

Did not spend the funds
☐

2.6 Please indicate how much of the LA handyperson funding was used in 2009/10 to:

Employ handyperson staff
£

Employ clerical, administrative or management staff
£

Support volunteers
£

Contribute to overheads
£

Purchase or lease vehicles
£

Pay for running costs of vehicles
£

Purchase equipment to provide services such as tools
£

Purchase supplies and consumables for client’s homes
£

Provide training and development for staff
£

Provide training and development for volunteers
£

Pay clients direct who independently employ contractors
£

Pay subcontractors direct
£

In other ways (please explain below):

In other ways (please explain below):

In other ways (please explain below):

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In other ways (please explain below):

In other ways (please explain below):

In other ways (please explain below):
2.7 Does this service provider charge clients for handyperson services funded (fully or partly) by LA funding?

Yes ☐

No ☐

If yes, please explain your charging policy, including eligibility criteria, fees charged and for what:

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3.4 What type of staff or subcontractors were employed in 2009/10 using LA handyperson funding? (Please tick all that apply)

- General handyperson
- Joiner
- Gardener
- Electrician
- Plumber
- Painter and Decorator
- Clerical, administrative or management
- Did not employ staff using LA funding
- Paid contractors to provide services
- Don’t know
- Other (please describe below):

3.5 Please describe any other changes in staffing you have made, such as providing training, enhancing skills, and changing working practices to improve effectiveness in 2009/10 as a result of the LA funding (max 100 words):

4 Information about Volunteers

4.1 How many volunteers were supported using the LA handyperson funding in 2009/10?

Headcount

_________________
4.2 How many volunteers were trained using the LA handyperson funding in 2009/10?

Headcount

Did not direct funding to volunteers (please tick)  

5 Information about Clients or Households

5.1 How many clients or households were visited in 2008/09 as a result of the LA handyperson funding received?

Clients

Households

5.2 How many clients or households were visited in 2009/10 as a result of the LA handyperson funding received?

Clients

Households

If there was a reduction in the number of clients or households seen from 2008/09 to 2009/10, please explain below:

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5.3 For clients or households visited in 2009/10 as a result of the LA handyperson funding received, from which of the following sources were they referred and how many were referred? (Please tick all that apply, and give number)

Self referral

Via police and local crime prevention initiative

From a community health worker

From an acute hospital service

Via an Older Person Advocacy Service, such as Age Concern
From Social Care Services
Via the Fire Service
Via a relative or friend
Did not have any additional clients through this source of funding
Unable to provide this data
Other (please describe below):

5.4 To which of the following groups was the LA handyperson funding in 2009/10 directed (please tick all that apply and if applicable, give criteria):

Any older person
Those with a disability
Those discharged from hospital
Victims of crime
Those with a particular housing tenure
Other specific targeted population
None
Don’t know
6 Information about Activities

6.1 To which of the following activities was the LA handyperson funding directed in 2009/10 (please tick all that apply):

Small repairs ☐
Home security improvements ☐
Minor adaptations ☐
Hospital discharge ☐
Energy efficiency improvements ☐
Gardening ☐
Fire safety improvements ☐
Home safety checks ☐
Falls prevention ☐
Unable to provide this data ☐

Other (please describe below):

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6.2 How many clients or households benefited from the following activities using the LA handyperson funding in 2009/10? (Please provide number):

Small repairs __________
Home security improvements __________
Minor adaptations __________
Hospital discharge __________
Energy efficiency improvements __________
Gardening __________
Fire safety improvements __________
Home safety checks __________
Falls prevention __________
Unable to provide this data __________
None __________

Other (please describe below):

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7 Other Information

Please provide any other information that you feel is relevant or helpful to the evaluation (maximum 100 words):

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SECTION D: SUPPLEMENTARY DATA

We would be grateful if you could provide us with any of the following in whatever format suits you:

- 2009/10 activity data in electronic format (e.g. spreadsheet). NB we will provide a data protection agreement. Do not include client identifiable items such as name or address;
- 2009/10 summary data (e.g. quarterly or annual report provided to commissioners or management group);
- Any evaluations that you have undertaken in 2009/10 or earlier years;
- Any client satisfaction surveys that you have undertaken in 2009/10 or earlier years.
THANK YOU FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY:

21st May to dlw3@york.ac.uk

You can also use the security enabled web form on http://php.york.ac.uk/inst/yhec/?q=content/service-provider-survey

You can also post the form, using free post to:

York Health Economics Consortium Ltd
FREEPOST YO405
University of York
Market Square
Vanbrugh Way
Heslington
YORK    YO10 5ZZ
GUIDANCE FOR COMPLETION OF THE SURVEY:
SERVICE PROVIDERS

Who Should Complete this Survey?

We expect service providers to complete this survey. However, LAs may have the data and may wish to complete on behalf of their service providers. We require a separate completed survey for each service provider.

We are happy to receive completed surveys direct from service providers, alternatively LAs may wish to forward to us on their behalf.

LAs and/or service providers may also be able to provide supplementary client level data, for example via a spreadsheet, and summary reports or evaluations. Guidance is given at the end of this information sheet.

How Should I Complete this Survey?

The purpose of the study is to undertake a national evaluation of CLG Part A funding. However, we recognise that some service providers have received funding from LAs which does not differentiate CLG Part A funds from other sources of funds. Section B of this survey collects data from service providers able to differentiate CLG Part A handyperson funding. Section C of this survey collects data from service providers unable to differentiate CLG Part A handyperson funding from other LA handyperson funding. Service providers are only required to complete Section B or Section C, not both. Everyone can complete Section D.

Throughout the survey where dates are referred to, please provide information in relation to the financial year.

SECTION A: BACKGROUND INFORMATION

Question 1.1 We require contact details from each service provider that has received funding, so that we can follow up any queries on the survey. We also require the name of the LA which has disbursed the funding so that we can ensure that we have received completed surveys from all recipients of LA funding, and also so that we can link responses from the service providers with those from LAs. This will be the LA that has sent you the survey to complete (in the case of service providers holding contracts with more than one LA).

Question 1.2 We would like to know whether the service provider was a new or existing service provider to the LA from which they received handyperson funding in 2009/10.

Question 1.3 Please indicate whether it is possible to separate out the CLG Part A handyperson funding received from the total LA funding received in 2009/10.

Indicate yes under Option 1, if it is possible to identify the CLG Part A handyperson funding received in 2009/10, and the use to which it was put, in which case Section B of the survey is to be completed.
Indicate yes under Option 2, if it is not possible to identify separately the CLG Part A handyperson funding from other LA handyperson funding received in 2009/10, but you can identify the total LA funding and the use to which it was put, in which case Section C of the survey is to be completed.

If neither of these options apply then service providers should give an explanation in the text box at Option 3, and go direct to Section D of the survey.

SECTION B: FOR SERVICE PROVIDERS WHO CAN IDENTIFY CLG PART A HANDYPEerson FUNDING SEPARATELY

2 Information about How CLG Part A Handyperson Funding Was Used By Each Service Provider

Question 2.1 Please state the amount of CLG Part A handyperson funding received from the LA in 2009/10.

Question 2.2 Please state the date on which the CLG Part A handyperson funding was received from the LA in 2009/10.

Question 2.3 Please state the amount of CLG Part A handyperson funding received from the LA spent in 2009/10.

Questions 2.4 If the spend from the CLG Part A handyperson funds is less than the funding received, please give reasons why the funds have not been fully spent (for example delays in setting up services and recruiting staff), and the purpose to which the unspent funds were or will be put (for example, funds may have been committed to 2010/11).

If no CLG Part A funding was spent in 2009/10, the remaining questions in Section B of the survey cannot be completed, and service providers should go direct to Section D of this survey.

Question 2.5 We are interested in whether CLG Part A funding was used to enhance existing services; to establish new services (if so, we would like a brief description of these services); to extend services to new client groups, or to new geographical areas for example to new client groups or to new geographical areas); or to maintain existing services with no (additional) changes if funding from other sources has been withdrawn. CLG Part A handyperson funding might be used for a combination of the above, in which case, please indicate all that apply.

Question 2.6 We would like a broad breakdown of the use to which the CLG Part A handyperson funding was put. The answers to these questions allow us to calculate the differences in spend of funding on staffing, and other purposes, across LAs and service providers, and also break down total spend at a national level.

Question 2.7 We are aiming to collect information about whether and through what mechanisms recipients of CLG Part A funded services are charged for handyperson services. Examples of charging policies and criteria include: a flat fee (if so what is this fee) to all clients; means tested with a charge to those above a certain income level (if so what is this level and what are the charges made to those who do pay); and payment for consumables only (if so what consumables). Several of these policies and criteria may be in place, in which case please describe all of these.
3. Information About Spend of CLG Part A Handyperson Funds on Staffing

**Question 3.1** Service providers may have used CLG Part A handyperson funding to employ more staff in 2009/10. In which case, we would like service providers to indicate how many staff (headcount) were employed with the funds. If no additional staff were employed, please put zero.

**Question 3.2** Service providers may have employed more staff and/or existing staff may have worked additional hours. We would like to know in total combining these options the additional hours funded (the average per week). If funds were not used for staffing, and no additional hours of staff time were funded, please put zero.

**Question 3.3** Service providers are asked to indicate all categories of staff groups that were funded by the CLG Part A handyperson funding. If a category of staff was funded but is not included on the tick check list, please describe under ‘other’. If funds were used to employ contractors rather than staff direct, please indicate. If additional staff were not funded, this option can be ticked also.

**Question 3.4** Service providers may also have used the CLG part A handyperson funding in other ways to enhance the training and skills of staff and volunteers, or to change working practices to deliver a more efficient and effective service. Please describe any of these briefly in the text box (using no more than 100 words).

4. Information about Volunteers

**Question 4.1** Service providers may have used some or all of their CLG Part A handyperson funding on supporting volunteers. Service providers are asked to indicate how many volunteers have benefitted.

**Question 4.2** Service providers may have used some or all of their CLG Part A handyperson funding on training volunteers. Service providers are asked to indicate how many volunteers have benefitted.

5. Information about Clients

**Question 5.1** The Handypersons Financial Benefits Toolkit\(^{10}\) requires service providers to enter data about households, and not clients (assuming that one household equates to one client). We are happy to make the same assumption, and therefore service providers can provide data about total numbers of clients and/or households that have benefitted from the CLG Part A handyperson funding in 2009/10. It is possible that no additional clients or households benefitted, for example if the funding was used to set up the service. If this is the case, please put zero, and give a brief explanation.

**Question 5.2** Please select all sources of referral to the service and if possible give the broad numbers, or if you are unable to do so, please indicate this. If clients were referred using other routes, service providers are asked to give the number coming through this route, together with a brief description of the route(s).

\(^{10}\) The Handypersons Financial Benefits Toolkit is an aid for developing business cases for handypersons’ services. The Toolkit and guidance are available from: http://communities.gov.uk/publications/housing/financialbenefitstoolkit.
Question 5.3 Please indicate to which client groups the CLG part A handyperson funding was directed. Funding may have been used for specific targeted groups, or for a broader client group. Please describe the client groups targeted, and give the criteria, for example, if funding is directed to older people, what is the age range.

6 Information about Activities

Question 6.1 Please indicate to which activities the CLG part A handyperson funding was directed. These activities partly reflect those given in the Handypersons Financial Benefits Toolkit. Service providers may have used the funding for specific activities, or for a wide variety of activities. There is also the option to describe additional activities.

Question 6.2 Some clients/households may have benefitted from more than one activity. Therefore the total clients or households under question 6.2 may be greater than the total number of clients or households given in question 5.1.

7. Other Information

Service providers can provide any information that they feel is relevant or useful to the evaluation.

SECTION C: FOR SERVICE PROVIDERS WHO CANNOT SEPARATE CLG PART A HANDYPERSON FUNDING FROM TOTAL LA HANDYPERSON FUNDING RECEIVED

2 Information about How LA Handyperson Funding Was Spent By Each Service Provider

Questions 2.1 and 2.2 Please state the amount of handyperson funding received from the LA in 2008/9 and 2009/10. If you received none in 2008/09, please write zero.

Question 2.3 Please state the date on which the handyperson funding was received from the LA in 2009/10.

Question 2.4 Please state the amount of LA handyperson funding received from the LA spent in 2009/10.

If no LA handyperson funding was spent in 2009/10, the remaining questions in Section C of the survey cannot be completed, and service providers should go direct to Section D of this survey.

Question 2.5 We are interested in whether LA funding was used to enhance existing services; to establish new services (if so, we would like a brief description of these services); to extend services to new client groups, or to new geographical areas; or to maintain existing services with no (additional) changes (for example if funding from other sources has been withdrawn, please describe). LA handyperson funding might be used for a combination of the above, in which case, please indicate all that apply.

Question 2.6 We would like a broad breakdown of the use to which the LA handyperson funding was put in 2009/10. The answers to these questions allow us to calculate the differences in spend of funding on staffing, and other purposes, across LAs and service providers, and also break down total spend at a national level.
Question 2.7 We are aiming to collect information about whether and through what mechanisms recipients of LA funded services are charged for handyperson services. Examples of charging policies and criteria include: a flat fee (if so what is this fee) to all clients; means tested with a charge to those above a certain income level (if so what is this level, and what are the charges made to those who do pay); and payment for consumables only (if so what consumables). Several of these policies and criteria may be in place, in which case please describe all of these.

3. Information about Spend of LA Handyperson Funds on Staffing

Questions 3.1 and 3.2 Service providers are asked to indicate how many staff (headcount) were employed using LA handyperson funding in 2008/9 and 2009/10. If no staff were employed, please write zero.

Question 3.3 Service providers may have employed more staff and/or existing staff may have worked additional hours in 2009/10, compared to 2008/9. We would like to know in total the additional hours funded (the average per week). If funds were not used for staffing, and no additional hours of staff time were funded, please put zero.

Question 3.4 Service providers are asked to indicate all categories of staff groups that were funded by the LA handyperson funding in 2009/10. If a category of staff was funded but is not included on the tick check list, please describe under ‘other’. If funds were used to employ contractors rather than staff direct, please indicate. If staff were not funded, this option can be ticked also.

Question 3.4 Service providers may also have used the LA handyperson funding in 2009/10 in other ways to enhance the training and skills of staff and volunteers, or to change working practices to deliver a more efficient and effective service. Please describe any of these briefly in the text box (using no more than 100 words).

4. Information about Volunteers

Question 4.1 Service providers may have used some or all of their LA handyperson funding on supporting volunteers. Service providers are asked to indicate how many volunteers have benefitted in 2009/10.

Question 4.2 Service providers may have used some or all of their LA handyperson funding on training volunteers. Service providers are asked to indicate how many volunteers have benefitted in 2009/10.

5 Information about Clients

Question 5.1 and 5.2 The Handypersons Financial Benefits Toolkit\(^\text{11}\) requires service providers to enter data about households, and not clients (assuming that one household equates to one client). We are happy to make the same assumption, and therefore service providers can provide data about total numbers or clients and/or households that have benefitted from the LA handyperson funding in 2008/09 and 2009/10. It is possible that no clients or households benefitted, for example if the funding was used to establish a new service. If this is the case, please give a brief explanation and write zero.

---
\(^\text{11}\) The Handypersons Financial Benefits Toolkit is an aid for developing business cases for handypersons’ services. The Toolkit and guidance are available from: http://communities.gov.uk/publications/housing/financialbenefitstoolkit.
Question 5.3 Please select all sources of referral to the service during 2009/10 and if possible give the broad numbers, or if you are unable to do so, please indicate this. If clients were referred using other routes, service providers are asked to give the number coming through this route, together with a brief description of the route(s).

Question 5.4 Please indicate to which client groups the LA handyperson funding was directed. Funding may have been used for specific targeted groups, or for a broader client group. Please describe the client groups targeted, and give the criteria, for example, if funding is directed to older people, what is the age range.

6 Information about Services Funded By LA Handyperson Funds

Question 6.1 Please indicate to which activities the LA handyperson funding in 2009/10 was directed. These activities partly reflect those given in the Handypersons Financial Benefits Toolkit. Service providers may have used the funding for specific activities, or for a wide variety of activities. There is also the option to describe additional activities.

Question 6.2 Some clients/households may have benefitted from more than one activity. Therefore the total clients or households under Question 6.2 may be greater than the total number of clients or households given in Question 5.2.

7. Other Information

Service providers can provide any information that they feel is relevant or useful to the evaluation.

SECTION D: SUPPLEMENTARY DATA

Data about Clients
Many respondents to our LA baseline survey informed us that they either submitted detailed data about clients to an external database, such as FEMIS or ATLAS, or told us that they held detailed data in their own databases or spreadsheets. We would like to receive additional data about clients, whether it is held in a database or spreadsheet. Additional fields could include age, gender, and housing tenure. Some service providers may have data about the handyperson jobs, such as the activities undertaken and the length of time taken to complete a job, and whether clients have received multiple visits. We would also like to receive data about outcomes, however recorded.

Supplementary Reports
Many respondents to our LA baseline survey informed us that they had undertaken evaluations or had submitted reports to various committees. These reports are likely to be about handyperson services that are funded from sources other than the CLG Part A funding. We would welcome receipt of any of these reports, and especially any evaluation reports. We are happy to receive evaluations and client satisfaction surveys undertaken in earlier years.

12 Femis is the Foundations Electronic Management Information System. It is designed to meet the current and future information and monitoring needs of the Home Improvement Agency. Web address is http://celstore.net.

13 Atlas is the name for Anchor Trust’s Staying Put’s database, which records and manages customer and contractor information. Atlas Agency Managers and Staying Put Staff have access to the system.
Process for Receipt of Supplementary Data

We are happy to receive client data at an individual client level. All data must be anonymised. We are happy to receive data in whatever format suits the service provider/LA, such as in a database, in a spreadsheet, or in a word of pdf file. We are happy to provide a data protection document detailing our processes for managing the data. We are also happy to receive data in summary format.

You can send supplementary data to Dianne Wright on dlw3@york.ac.uk.

Any queries you might have, please do not hesitate to contact Dianne on 01904 434827.
APPENDIX C

Surveys Sent To Local Authorities and Service Providers for Funding Received In 2010/11
COUNTY COUNCIL SURVEY

Survey on DCLG Part A Handyperson Services Funding:
Spend for 2010 to 2011

FOR COMPLETION BY COUNTY COUNCILS

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format:

http://php.york.ac.uk/inst/yhec/?q=content/county-council-survey-2010-2011

All data collected will be anonymised. No individual local authority or service provider will be identified in the analysis or in reports.

SECTION A: BACKGROUND INFORMATION

1.2 Contact Details:

Name of Local Authority: ________________________________

Name of person completing form: ________________________________

Job title of person completing form: ________________________________

Email contact address of person completing form: ________________________________

Telephone number of person completing form: ________________________________
SECTION B: INFORMATION ABOUT FUNDS

2.1 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2009/10:

£________

2.2 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services during 2010/11:

£________

2.3 How many months are covered by the spend given at question 2.2:

________

2.4 Spend on handyperson services during 2010/11 using only Part A funding:

£________

2.5 How many months are covered by the spend given at question 2.4:

________

2.6 Planned spend on handyperson services using only Part A funding for the whole of 2010/11:

£________

2.7 If you had planned to carry forward unspent Part A funds from 2009/10 to 2010/11, were you able to do so:

Yes, we had planned to do so, and were able to carry forward the funds

No, we had planned to do so, but were unable to carry forward the funds

No we had not planned to carry forward the funds
2.8 Do you expect to **underspend** on the provision of handyperson services against Part A funding by the end of 2010/11?

Yes  
No  
Don’t know  

2.9 If yes, will the underspend be:

Carried forward to use on handyperson services in 2011/12  

Used to support other (non-statutory) related services e.g. other supporting people Services  

Used to fund other pressures facing the council  

Other  

2.10 Was the DCLG Part A funding transferred to District Councils or direct to Service Providers:

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<tr>
<th>To District Councils</th>
<th>Go to Section C</th>
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<tbody>
<tr>
<td>Direct to service providers</td>
<td>Go to Section D</td>
</tr>
<tr>
<td>Did not disburse the DCLG part A funding in 2010/11</td>
<td>Go to Section E</td>
</tr>
</tbody>
</table>
SECTION C: INFORMATION ABOUT DISBURSEMENT OF CLG PART A FUNDS TO DISTRICT COUNCILS:

3.1 Across how many District Councils was DCLG Part A funding disbursed in 2010/11? 

_________

3.2 Please list all District Councils in your area and the amount of DCLG funding they received. If a District Council did not receive any funding, please indicate with a zero, and add a brief explanation in the comments box at 3.3.

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<tr>
<th>Name of District Council</th>
<th>DCLG Part A funding received</th>
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3.3 Please add any comments about funding allocated to District Councils:

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3.5 If the funding level has changed, can you give any reasons for the changes?

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3.6 How do you expect district councils to respond to any changes or potential for changes in funding for 2011/12 and plan for the future sustainability of handyperson services?

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3.7 Will district councils receive funding from other partners as well as or in addition to local authority funding in 2011/12?

Yes □ (please describe funding partners) ______________________________

No □

Don't know □

PLEASE GO TO SECTION E.
SECTION D: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO SERVICE PROVIDERS:

4.1 Across how many Service Providers was DCLG Part A funding disbursed in 2010/11?

________

4.2 Please list all Service Providers in your area and the amount of funding they will receive in 2010/11:

<table>
<thead>
<tr>
<th>Name of service provider</th>
<th>DCLG Part A funding they will receive</th>
<th>Total LA funding they will receive for handyperson services</th>
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4.3 Will your funding of handyperson services in 2011/12 be?

The same as in 2010/11  
Less than the funding received in 2010/11, and by how much    £_________
More than the funding received in 2010/11, and by how much    £_________
Don't know  

4.4 If the funding level has changed, can you give any reasons for the changes?

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4.5 How do you expect service providers to respond to any changes or potential for changes in funding for 2011/12 and plan for their future sustainability?

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4.6 Will handyperson services be funded by other partners as well as or in addition to local authority funding in 2011/12

Yes ☐ (please describe funding partners) ____________________________
No ☐
Don’t know ☐

SECTION E: ADDITIONAL INFORMATION:

5.1 Please add any other comments you might have about funding handyperson services in the future

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THANK YOU FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY 11TH FEBRUARY TO:

dianne.wright@york.ac.uk

You can also use the security enabled web form on:

http://php.york.ac.uk/inst/yhec/?q=content/county-council-survey-2010-2011

You can also post the form, using free post to:

York Health Economics Consortium Ltd
FREEPOST YO405
University of York
Market Square
Vanbrugh Way
Heslington
YORK YO10 5ZZ
GUIDANCE FOR COMPLETION OF THE SURVEY:
COUNTY COUNCILS

Who Should Complete this Survey?

County Councils will complete this survey.

We are assuming that County Councils will either have passed DCLG Part A Handyperson funding to District Councils or direct to service providers. Section C will be completed by those passing funding to district councils; Section D will be completed by those passing funding direct to service providers.

Timescale Covered by this Survey

Unfortunately, our evaluation timetable does not allow us to collect data after the end of the financial year and therefore we are requesting information for part-year funding, spend and activity. Ideally, we would like information about funds received, spend, and activity covering the first nine months of the financial year 2010/11. If this is not possible please complete this survey for those months for which you have information. Please indicate as appropriate in the survey for which months you are providing data.

SECTION A: BACKGROUND INFORMATION

We require details of a contact person in the case of queries. We will also provide to the LA a summary of our survey findings.

SECTION B: INFORMATION ABOUT USE OF FUNDS

Questions 2.1 and 2.2 We want to know how much in total was spent (from any funding sources) on handyperson services in financial years 2009/10 and part year 2010/11. This enables us to assess the contribution made by the DCLG Part A funding to the total funding of handyperson services in individual LAs and nationally, as well as assess the changes in spend in handypersons services from year to year.

Question 2.3 Please indicate how many months in 2010/11 are covered by the spend given at question 2.2.

Question 2.4 We want to know how much of the DCLG Part A funding was spent in the financial year 2010/11.

Question 2.5 Please indicate how many months in 2010/11 are covered by the spend given at question 2.4.

Question 2.6 We are interested in what is the planned spend on handyperson services for 2010/11 using DCLG Part A funding.

Question 2.7 Many LAs told us that they had not spent all their DCLG Part A funding in 2009/10 and they planned to carry unspent funds over to 2010/11. We are interested in whether LAs were able to do so.
Question 2.8 We are interested in whether you expect that you will underspend your DCLG Part A funding on handyperson services in 2010/11.

Question 2.9 If not all DCLG Part A funding will be spent on handyperson services in 2010/11, we are interested in how you plan to use the underspending, including carrying forward to 2011/12.

Question 2.10 Please indicate whether your LA passed the DCLG Part A funding to District Councils, in which case go to Section C of this survey; or direct to Service Providers, in which case go to Section D of this survey; or if your LA did not spend the DCLG funds in 2010/11 go direct to Section E.

SECTION C: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO DISTRICT COUNCILS

Question 3.1 We wish to know across how many District Councils the DCLG Part A was disbursed, for onward disbursement to service providers (which may be in-house provision by the District Council). We are interested in whether LAs allocated the funds to many District Councils, or to a small number.

Question 3.2 Please provide for each District Council, their name and how much of the DCLG Part A funding for 2010/11 they received, and the total LA funding they received in 2010/11 (to allow us to assess the contribution made by the CLG Part A funding.)

Question 3.4 We are interested in whether your LA will be funding handyperson services in 2011/12, and if so whether it will at the same level as in 2010/11.

Question 3.5 We are interested in the reasons for the changes in funding indicated at Question 3.4. Increases in funding may be due, for example, to inflation, or to changes in the contract resulting in changes in the quantity of services delivered. Conversely, reductions may be as a result of financial pressures within the LA.

Question 3.6 We are interested in how district councils may respond to changes in funding, and we expect that you will have had negotiations to this effect. We would like you to give us any information you might have on such changes, for example, changes in the number of district councils funded, number of service providers funded, or changes in the range and type of services to be provided.

Question 3.7 We know that many LAs expected that handyperson services would be jointly funded with other agencies, and we would like to receive information on whether other agencies will be funding handyperson services in your localities.

SECTION D INFORMATION ABOUT DISBURSEMENT OF FUNDS DIRECT TO SERVICE PROVIDERS

Question 4.1 We wish to know across how many service providers the DCLG Part A was disbursed. We are interested in whether LAs allocated the funds to many providers, or to a small number.

Question 4.2 Please provide for each service provider, their name and how much of the DCLG Part A funding for 2010/11 they received, and the total LA funding they will receive in 2010/11 (to allow us to assess the contribution made by the DCLG Part A funding.)
**Question 4.3** We are interested in whether your LA will be funding handyperson services in 2011/12, and if so whether it will at the same level as in 2010/11.

**Question 4.4** We are interested in the reasons for the changes in funding indicated at Question 5.1. Increases in funding may be due, for example, to inflation, or to changes in the contract resulting in changes in the quantity of services delivered. Conversely, reductions may be as a result of financial pressures within the LA.

**Question 4.5** We are interested in how service providers may respond to changes in funding, and we expect that you will have had contract negotiations to this effect. We would like you to give us any information you might have on such changes, for example, changes in number of clients to be seen, downsizing services through reductions in staffing, changes in criteria for acceptance of clients, changes in charging for services, or mergers in services.

**Question 4.6** We know that many LAs expected that handyperson services would be jointly funded with other agencies, and we would like to receive information on whether other agencies will be funding handyperson services in your localities.

**SECTION E ANY ADDITIONAL INFORMATION**

**Question 5.1** Please provide us with any other information that you feel will be of interest or value to the Evaluation Team.

Please send your completed surveys to Dianne Wright on dianne.wright@york.ac.uk, or use our web enabled survey form.

If you have any queries please do not hesitate to contact Dianne on 01904 323626.
DISTRICT COUNCIL LOCAL AUTHORITIES SURVEY

Survey on DCLG Part A Handyperson Services Funding: Spend for 2010 to 2011

FOR COMPLETION BY DISTRICT COUNCIL LOCAL AUTHORITIES

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format:

All data collected will be anonymised. No individual local authority or service provider will be identified in the analysis or in reports.

SECTION A: BACKGROUND INFORMATION

1.3 Contact Details:

Name of Local Authority: __________________________

Name of person completing form: __________________________

Job title of person completing form: __________________________

Email contact address of person completing form: __________________________

Telephone number of person completing form: __________________________
SECTION B: INFORMATION ABOUT FUNDS

2.1 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2009/10:

£_________

2.2 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services during 2010/11:

£_________

2.4 How many months are covered by the spend given at question 2.2:

_________

2.4 Spend on handyperson services during 2010/11 using only Part A funding:

£_________

2.6 How many months are covered by the spend given at question 2.4:

_________

2.6 Planned spend on handyperson services using only Part A funding for the whole of 2010/11:

£_________

2.8 If you had planned to carry forward unspent Part A funds from 2009/10 to 2010/11, were you able to do so:

Yes, we had planned to do so, and were able to carry forward the funds  
No, we had planned to do so, but were unable to carry forward the funds  
No we had not planned to carry forward the funds
2.8 Do you expect to **underspend** on the provision of handyperson services against Part A funding by the end of **2010/11**?

Yes ☐
No ☐
Don’t know ☐

2.9 **If yes**, will the underspend be:

- Carried forward to use on handyperson services in 2011/12 ☐
- Used to support other (non-statutory) related services e.g. other supporting people services ☐
- Used to fund other pressures facing the council ☐
- Other ☐

**SECTION C: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO SERVICE PROVIDERS:**

3.1 Across how many Service Providers was DCLG Part A funding disbursed in **2010/11**?

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3.2 Please list all Service Providers in your area and the amount of funding they will receive in **2010/11**:

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<tr>
<th>Name of service provider</th>
<th>DCLG Part A funding they will receive</th>
<th>Total LA funding they will receive for handyperson services</th>
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SECTION D: SUSTAINABILITY OF HANDYPERSON SERVICES

4.1 Will your funding of handyperson services in 2011/12 be:

- The same as in 2010/11 □
- Less than the funding received in 2010/11, and by how much □ £_________
- More than the funding received in 2010/11, and by how much □ £_________
- Don’t know □

4.2 If the funding level has changed, can you give any reasons for the changes?

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4.3 How do you expect service providers to respond to any changes or potential for changes in funding for 2011/12 and plan for their future sustainability:

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4.4 Will handyperson services be funded by other partners as well as or in addition to local authority funding in 2011/12

- Yes □ (please describe funding partners) ____________________________
- No □
- Don’t know □
4.5 Please add any other comments you might have about funding handyperson services in the future

THANK YOU FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY 11TH FEBRUARY TO:

dianne.wright@york.ac.uk

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You can also post the form, using free post to:

York Health Economics Consortium Ltd
FREEPOST YO405
University of York
Market Square
Vanbrugh Way
Heslington
YORK YO10 5ZZ
GUIDANCE FOR COMPLETION OF THE SURVEY: DISTRICT COUNCIL PROVIDERS

Who Should Complete this Survey?

District Council local authorities will complete this survey.

We are assuming that LAs have passed DCLG Part A Handyperson funding direct to service providers.

Timescale Covered by this Survey

Unfortunately, our evaluation timetable does not allow us to collect data after the end of the financial year and therefore we are requesting information for part-year funding, spend and activity. Ideally, we would like information about funds received, spend, and activity covering the first nine months of the financial year 2010/11. If this is not possible please complete this survey for those months for which you have information. Please indicate as appropriate in the survey for which months you are providing data.

SECTION A: BACKGROUND INFORMATION

We require details of a contact person in the case of queries. We will also provide to the LA a summary of our survey findings.

SECTION B: INFORMATION ABOUT USE OF FUNDS

Questions 2.1 and 2.2 We want to know how much in total was spent (from any funding sources) on handyperson services in financial years 2009/10 and part year 2010/11. This enables us to assess the contribution made by the DCLG Part A funding to the total funding of handyperson services in individual LAs and nationally, as well as assess the changes in spend in handypersons services from year to year.

Question 2.3 Please indicate how many months in 2010/11 are covered by the spend given at question 2.2.

Question 2.4 We want to know how much of the DCLG Part A funding was spent in the financial year 2010/11.

Question 2.5 Please indicate how many months in 2010/11 are covered by the spend given at question 2.4.

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Question 2.7 Many LAs told us that they had not spent all their DCLG Part A funding in 2009/10, we are interested in the ways that it was spent and they planned to carry unspent funds over to 2010/11. We are interested in whether LAs were able to do so.

Question 2.8 We are interested in whether you expect that you will underspend your DCLG Part A funding on handyperson services in 2010/11.
**Question 2.9** If not all DCLG Part A funding will be spent on handyperson services in 2010/11, we are interested in how you plan to use the underspending, including carrying forward to 2011/12.

**SECTION C: INFORMATION ABOUT DISBURSEMENT OF FUNDS**

**Question 3.1** We wish to know across how many service providers the CLG Part A was disbursed. We are interested in whether LAs allocated the funds to many providers, or to a small number.

**Question 3.2** Please provide for each service provider, their name and how much of the CLG Part A funding for 2010/11 they received, and the total LA funding they received in 2010/11 (to allow us to assess the contribution made by the CLG Part A funding.)

**SECTION D SUSTAINABILITY OF HANDYPERSON SERVICES**

**Question 4.1** We are interested in whether your LA will be funding handyperson services in 2011/12, and if so whether it will at the same level as in 2010/11.

**Question 4.2** We are interested in the reasons for the changes in funding indicated at Question 4.1. Increases in funding may be due, for example, to inflation, or to changes in the contract resulting in changes in the quantity of services delivered. Conversely, reductions may be as a result of financial pressures within the LA.

**Question 4.3** We are interested in how service providers may respond to changes in funding, and we expect that you will have had contract negotiations to this effect. We would like you to give us any information you might have on such changes, for example, changes in number of clients to be seen, downsizing services through reductions in staffing, changes in criteria for acceptance of clients, changes in charging for services, or mergers in services.

**Question 4.4** We know that many LAs expected that handyperson services would be jointly funded with other agencies, and we would like to receive information on whether other agencies will be funding handyperson services in your localities.

**Question 4.5** Please provide us with any other information that you feel will be of interest or value to the Evaluation Team.

Please send your completed surveys to Dianne Wright on dianne.wright@york.ac.uk, or use our web enabled survey form.

If you have any queries please do not hesitate to contact Dianne on 01904 323626.
SINGLE TIER LOCAL AUTHORITIES SURVEY

Survey on DCLG Part A Handyperson Services Funding:
Spend for 2010 to 2011

FOR COMPLETION BY SINGLE TIER LOCAL AUTHORITIES

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format:

http://php.york.ac.uk/inst/yhec/?q=content/single-tier-survey-2010-2011

All data collected will be anonymised. No individual local authority or service provider will be identified in the analysis or in reports.

SECTION A: BACKGROUND INFORMATION

1.4 Contact Details:

Name of Local Authority: ________________________________

Name of person completing form: ________________________________

Job title of person completing form: ________________________________

Email contact address of person completing form: ________________________________

Telephone number of person completing form: ________________________________
SECTION B: INFORMATION ABOUT FUNDS

2.1 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services in 2009/10:
£________

2.2 Total spend (i.e. from all funding sources, including Part A funding) on handyperson services during 2010/11:
£________

2.5 How many months are covered by the spend given at question 2.2:
________

2.4 Spend on handyperson services during 2010/11 using only Part A funding:
£________

2.7 How many months are covered by the spend given at question 2.4:
________

2.6 Planned spend on handyperson services using only Part A funding for the whole of 2010/11:
£________

2.9 If you had planned to carry forward unspent Part A funds from 2009/10 to 2010/11, were you able to do so:

Yes, we had planned to do so, and were able to carry forward the funds □
No, we had planned to do so, but were unable to carry forward the funds □
No we had not planned to carry forward the funds □
2.8 Do you expect to **underspend** on the provision of handyperson services against Part A funding by the end of **2010/11**?

Yes ☐
No ☐
Don’t know ☐

2.9 **If yes,** will the underspend be:

Carried forward to use on handyperson services in 2011/12 ☐

Used to support other (non-statutory) related services e.g. other supporting people services ☐

Used to fund other pressures facing the council ☐

Other ☐

SECTION C: INFORMATION ABOUT DISBURSEMENT OF FUNDS TO SERVICE PROVIDERS:

3.1 Across how many Service Providers was DCLG Part A funding disbursed in **2010/11**?

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3.2 Please list all Service Providers in your area and the amount of funding they will receive in **2010/11**:

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SECTION D: SUSTAINABILITY OF HANDYPERSON SERVICES

4.4 Will your funding of handyperson services in 2011/12 be:

- The same as in 2010/11
- Less than the funding received in 2010/11, and by how much: £_________
- More than the funding received in 2010/11, and by how much: £_________
- Don't know

4.5 If the funding level has changed, can you give any reasons for the changes?

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4.6 How do you expect service providers to respond to any changes or potential for changes in funding for 2011/12 and plan for their future sustainability:

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4.5 Will handyperson services be funded by other partners as well as or in addition to local authority funding in 2011/12

- Yes
- No
- Don't know
4.5 Please add any other comments you might have about funding handyperson services in the future

THANK YOU FOR HELPING WITH THE EVALUATION.

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University of York
Market Square
Vanbrugh Way
Heslington
YORK Y010 5ZZ
GUIDANCE FOR COMPLETION OF THE SURVEY:
SINGLE TIER PROVIDERS

Who Should Complete this Survey?

Single tier local authorities will complete this survey.

We are assuming that LAs have passed DCLG Part A Handyperson funding direct to service providers.

Timescale Covered by this Survey

Unfortunately, our evaluation timetable does not allow us to collect data after the end of the financial year and therefore we are requesting information for part-year funding, spend and activity. Ideally, we would like information about funds received, spend, and activity covering the first nine months of the financial year 2010/11. If this is not possible please complete this survey for those months for which you have information. Please indicate as appropriate in the survey for which months you are providing data.

SECTION A: BACKGROUND INFORMATION

We require details of a contact person in the case of queries. We will also provide to the LA a summary of our survey findings.

SECTION B: INFORMATION ABOUT USE OF FUNDS

Questions 2.1 and 2.2 We want to know how much in total was spent (from any funding sources) on handyperson services in financial years 2009/10 and part year 2010/11. This enables us to assess the contribution made by the DCLG Part A funding to the total funding of handyperson services in individual LAs and nationally, as well as assess the changes in spend in handypersons services from year to year.

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Question 2.7 Many LAs told us that they had not spent all their DCLG Part A funding in 2009/10, we are interested in the ways that it was spent and they planned to carry unspent funds over to 2010/11. We are interested in whether LAs were able to do so.

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Question 2.9 If not all DCLG Part A funding will be spent on handyperson services in 2010/11, we are interested in how you plan to use the underspending, including carrying forward to 2011/12.

SECTION C: INFORMATION ABOUT DISBURSEMENT OF FUNDS

Question 3.1 We wish to know across how many service providers the CLG Part A was disbursed. We are interested in whether LAs allocated the funds to many providers, or to a small number.

Question 3.2 Please provide for each service provider, their name and how much of the CLG Part A funding for 2010/11 they received, and the total LA funding they received in 2010/11 (to allow us to assess the contribution made by the CLG Part A funding.)

SECTION D SUSTAINABILITY OF HANDYPERSON SERVICES

Question 4.1 We are interested in whether your LA will be funding handyperson services in 2011/12, and if so whether it will at the same level as in 2010/11.

Question 4.2 We are interested in the reasons for the changes in funding indicated at Question 4.1. Increases in funding may be due, for example, to inflation, or to changes in the contract resulting in changes in the quantity of services delivered. Conversely, reductions may be as a result of financial pressures within the LA.

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If you have any queries please do not hesitate to contact Dianne on 01904 323626.
SERVICE PROVIDER SURVEY

Survey on DCLG Part A Handyperson Services Funding:
Spend for 2010 to 2011

THIS SURVEY CAN EITHER BE COMPLETED BY THE LOCAL AUTHORITY OR
FORWARDED TO SERVICE PROVIDERS FOR COMPLETION.

Guidance for completion of this survey can be found at the end of this document.

This form can also be completed in web format:

http://php.york.ac.uk/inst/yhec/?q=content/service-provider-survey-2010-2011

All data collected will be anonymised. No individual local authority or service provider will be
identified in the analysis or in reports.

We require a separate survey to be completed for EACH service provider receiving DCLG Part
A handyperson funding.

SECTION A: BACKGROUND INFORMATION

1.5 Contact Details:

Name of Service Provider: ___________________________________________

Name of person completing form: _____________________________________

Job title of person completing form: ________________________________

Email contact address of person completing form: _______________________

Telephone number of person completing form: __________________________

Name of LA from which funding received: ______________________________

THE UNIVERSITY OF YORK
1.2 Identification of DCLG Part A handyperson funding. Please select one of the three options below and choose the appropriate section of the survey to complete:

Option 1: We can identify separately the DCLG Part A handyperson funding we received in 2010/11:

Yes ☐ If yes, please go to Section B below.

No ☐ If no, please go to Option 2.

Option 2: We cannot identify separately the DCLG Part A handyperson funding from other sources of LA funding, but we can identify the total LA funding for handyperson services we received in 2010/11:

Yes ☐ If yes, please go to Section C on page 6 of this survey.

No ☐ If no, please go to Option 3.

Option 3: If neither of the above options apply, please give an explanation below, and go direct to Section D on page 11 of this survey:

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SECTION B: TO BE COMPLETED BY SERVICE PROVIDERS WHO CAN IDENTIFY DCLG PART A HANDYPERSON FUNDING SEPARATELY

2 Information about DCLG Part A Handyperson Funding

2.1 Amount of DCLG Part A handyperson funding received by service provider to date in 2010/11:

£_________

2.2 Number of months covered by funding:

__________
2.3 Amount of DCLG Part A handyperson funding spent during 2010/11:
£________

2.4 Number of months covered by spend:

________

2.5 **Total** planned spend using DCLG Part A handyperson funding for 2010/11:

£________

2.6 If the DCLG Part A handyperson funding planned to be spent in 2010/11 will be less than the total DCLG Part A handyperson funding to be received in 2010/11, please explain why, and how will these funds be used.

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2.7 Will you be receiving any funding from your Local Authority for handyperson services for 2011/12?

Yes ☐
No ☐
Don’t know ☐

If **yes**, will the funding level be:

The same as in 2010/11 ☐

Less than the funding received in 2010/11, and by how much ☐ £________

More than the funding received in 2010/11, and by how much ☐ £________
2.8 Will you be receiving any funding from your local health services for handyperson services for 2011/12?

Yes ☐
No ☐
Don’t know ☐

If yes, will the funding level be:

The same as in 2010/11 ☐
Less than the funding received in 2010/11, and by how much ☐ £_________
More than the funding received in 2010/11, and by how much ☐ £_________

2.9 If your overall funding for 2011/12 is less than that received for 2010/11, will you be responding with any of the following (please tick all that apply)

Not applicable ☐
Merging with other services ☐
Sharing services ☐
Jointly procuring materials ☐
Reduction in staff hours worked ☐
Reduction in number of staff employed ☐
Reduction in range of services offered ☐
Other (please describe)

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2.10 If your overall funding for 2011/12 is more than that received for 2010/11, will you be responding with any of the following (please tick all that apply)

Not applicable ☐
Increase in staff hours worked ☐
Increase in number of staff employed ☐
Increase in range of services offered ☐
Other (please describe)

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2.11 Are you planning any changes in your business model and the way the service will be delivered in 2011/12 and beyond? If yes, please describe briefly:

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3 Information about Clients or Households

3.1 How many clients or households were visited during 2010/11 as a result of the DCLG Part A handyperson funding received?

_________ Clients

_________ Households

3.2 Across how many months do these visits cover?

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3.3 If no clients or households were seen as a result of the DCLG Part A handyperson funding received, please explain below:

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4. **Charging for services**

4.1 Does your service provider charge clients for handyperson services funded (fully or partly) by DCLG Part A funding?

Yes ☐
No ☐

**If yes,** please explain your charging policy, including eligibility criteria, fees charged and for what:

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4.2 **If yes, do the** charges reflect full cost or are they subsidised?

Yes, reflect full cost ☐
No, they are subsidised ☐
Do not charge for services ☐

4.3 Does your service provider intend to charge for handyperson services in the future?

Yes ☐
No ☐
Don’t know ☐

**If yes,** please describe:

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PLEASE GO TO SECTION D ON PAGE 11 OF THIS SURVEY
SECTION C: TO BE COMPLETED BY SERVICE PROVIDERS WHO CANNOT SEPARATE DCLG PART A HANDYPERSON FUNDING FROM THE TOTAL LA HANDYPERSON FUNDING RECEIVED

2 Information about How Total LA Funding was spent By Service Provider

2.1 Amount of LA handyperson funding received in 2009/10:
£_________

2.2 Amount of LA handyperson funding received in 2010/11 to date:
£_________

2.3 Number of months covered by this funding:
_________

2.4 Amount of LA handyperson funding spent during 2010/11 to date:
£_________

2.5 Number of months covered by this funding:
_________

2.6 What is the planned spend on handyperson services for 2010/11?
£_________

2.7 Will you be receiving any funding from your Local Authority for handyperson services for 2011/12?
Yes ☐
No ☐
Don’t know ☐

If yes, will the funding level be:

The same as in 2010/11 ☐
Less than the funding received in 2010/11, and by how much ☐ £_________
More than the funding received in 2010/11, and by how much ☐ £_________
2.8 Will you be receiving any funding from your local health services for handyperson services for 2011/12?

Yes  
No  
Don’t know  

If yes, will the funding level be:

The same as in 2010/11  
Less than the funding received in 2010/11, and by how much £_________  
More than the funding received in 2010/11, and by how much £_________

2.9 If your overall funding for 2011/12 is less than that received for 2010/11, will you be responding with any of the following (please tick all that apply):

Not applicable  
Merging with other services  
Sharing services  
Jointly procuring materials  
Reduction in staff hours worked  
Reduction in number of staff employed  
Reduction in range of services offered  
Other (please describe)

2.10 If your overall funding for 2011/12 is more than that received for 2010/11, will you be responding with any of the following (please tick all that apply)

Not applicable  
Increase in staff hours worked  
Increase in number of staff employed  
Increase in range of services offered  
Other (please describe):
2.11 Are you planning any changes in your business model and the way the service will be delivered in 2011/12 and beyond? If yes, please describe briefly:

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3 Information about Clients or Households

3.1 How many clients or households were visited during 2010/11 as a result of the LA handyperson funding received?

_________ Clients

_________ Households

3.2 Across how many months do these visits cover?

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3.3 If no clients or households were seen as a result of the LA handyperson funding received, please explain below:

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4. Charging for Services

4.1 Does your service provider charge clients for handyperson services funded (fully or partly) by LA funding?

Yes □
No □

If yes, please explain your charging policy, including eligibility criteria, fees charged and for what:

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4.2 If yes, do the charges reflect full cost or are they subsidised?

Yes □
No □

4.3 Does your service provider intend to charge for handyperson services in the future?

Yes □
No □
Don’t know □

If yes, please describe:

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Appendix C
SECTION D OTHER INFORMATION

Please provide any other information that you feel is relevant or helpful to the evaluation (maximum 100 words):

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THANK YOU FOR HELPING WITH THE EVALUATION.

ALL SURVEY DATA PROVIDED WILL BE STRICTLY ANONYMISED, AND YOUR ORGANISATION WILL NOT BE IDENTIFIED IN ANY EVALUATION REPORT, EXCEPTING WITH YOUR PERMISSION.

PLEASE RETURN THIS COMPLETED SURVEY BY 11TH FEBRUARY TO:

dianne.wright@york.ac.uk

You can also use the security enabled web form on:

http://php.york.ac.uk/inst/yhec/?q=content/service-provider-survey-2010-2011

You can also post the form, using free post to:

York Health Economics Consortium Ltd
FREEPOST YO405
University of York
Market Square
Vanbrugh Way
Heslington
GUIDANCE FOR COMPLETION OF THE SURVEY: SERVICE PROVIDERS

Who Should Complete this Survey?

We expect service providers to complete this survey. However, LAs may have the data and may wish to complete on behalf of their service providers. We require a separate completed survey for each service provider.

We are happy to receive completed surveys direct from service providers, alternatively LAs may wish to forward to us on their behalf.

How Should I Complete this Survey?

The purpose of the study is to undertake a national evaluation of DCLG Part A funding. However, we recognise that some service providers have received funding from LAs which does not differentiate DCLG Part A funds from other sources of funds. Section B of this survey collects data from service providers able to differentiate DCLG Part A handyperson funding. Section C of this survey collects data from service providers unable to differentiate DCLG Part A handyperson funding from other LA handyperson funding. Service providers are only required to complete Section B or Section C, not both. Everyone can complete Section D.

Timescale Covered by this Survey

Unfortunately, our evaluation timetable does not allow us to collect data after the end of the financial year and therefore we are requesting information for part-year funding, spend and activity. Ideally, we would like information about funds received, spend, and activity covering the first nine months of the financial year 2010/11. If this is not possible please complete this survey for those months for which you have information. Please indicate as appropriate in the survey for which months you are providing data.

SECTION A: BACKGROUND INFORMATION

Question 1.1 We require contact details from each service provider that has received funding, so that we can follow up any queries on the survey. We also require the name of the LA which has disbursed the funding so that we can ensure that we have received completed surveys from all recipients of LA funding, and also so that we can link responses from the service providers with those from LAs.

Question 1.2 Please indicate whether it is possible to separate out the DCLG Part A handyperson funding received from the total LA funding received in 2010/11.

Indicate yes under Option 1, if it is possible to identify the DCLG Part A handyperson funding received in 2010/11, and the use to which it was put, in which case Section B of the survey is to be completed.

Indicate yes under Option 2, if it is not possible to identify separately the DCLG Part A handyperson funding from other LA handyperson funding received in 2010/11, but you can identify the total LA funding and the use to which it was put, in which case Section C of the survey is to be completed.
If neither of these options apply then service providers should give an explanation in the text box at Option 3, and go direct to Section D of the survey.

SECTION B: FOR SERVICE PROVIDERS WHO CAN IDENTIFY DCLG PART A HANDYPERSON FUNDING SEPARATELY

2 Information about How DCLG Part A Handyperson Funding Was Used By Each Service Provider

Question 2.1 Please state the amount of DCLG Part A handyperson funding that has been received from the LA in 2010/11.

Question 2.2 Please indicate how many months in 2010/11 are covered by this funding.

Question 2.3 Please state the amount of DCLG Part A handyperson funding received from the LA spent in 2010/11.

Question 2.4 Please indicate how many months in 2010/11 are covered by this spend.

Question 2.5 Please indicate what is your total planned spend for the whole of the 2010/11 financial year.

Question 2.6 If the planned spend from the DCLG Part A handyperson funds will be less than the funding received in 2010/11, please give reasons why the funds will not be fully spent (for example delays in setting up services and recruiting staff), and the purpose to which the unspent funds were or will be put (for example, funds may have been committed to 2011/12).

Question 2.7 We are interested in whether LAs are intending to fund handyperson services in 2011/12. Please indicate whether you will be receiving funding from your LA, and if so by how much it will be less or more than the funding received in 2010/11.

Question 2.8 We are also interested in whether local health services are intending to fund handyperson services in 2011/12. Please indicate whether you will be receiving funding from local health services, and if so by how much it will be less or more than any such funding received in 2010/11.

Questions 2.9 and 2.10 We are interested in how service providers will respond to changes in future funding levels, whether this be a reduction or increase in funding compared to previous years. Please indicate how you are planning to respond to either of these scenarios, and do give us any additional information.

Question 2.11 We are interested in any planned changes to your business model for 2011/12 onwards, and how overall you plan to deliver your services.

3 Information about Clients or Households

Question 3.1 Service providers can provide data about total numbers of clients and/or households that have benefitted from the DCLG Part A handyperson funding in 2010/11. It is possible that no additional clients or households benefitted, for example if the funding was used to set up the service. If this is the case, please put zero, and give a brief explanation at question 3.3.
Question 3.2 Please indicate how many months are covered by the information on visits given at question 3.1.

Question 3.3 If no clients or households benefitted from funding during 2010/11, please provide an explanation.

4 Charging for Services

Question 4.1 We are aiming to collect information about whether and through what mechanisms recipients of LA funded services are charged for handyperson services. Examples of charging policies and criteria include: a flat fee (if so what is this fee) to all clients; means tested with a charge to those above a certain income level (if so what is this level and what are the charges made to those who do pay); and payment for consumables only (if so what consumables). Several of these policies and criteria may be in place, in which case please describe all of these. If you have already provided this information to us in your previous survey response, just indicate that you have done so.

Question 4.2 Please indicate whether your changes cover the full cost of delivering the service to a client or are subsidised.

Question 4.3 Please indicate whether you intend to charge for handyperson services in the future and if so what charging mechanisms do you intend to adopt.

SECTION C: FOR SERVICE PROVIDERS WHO CANNOT SEPARATE DCLG PART A HANDYPERSON FUNDING FROM TOTAL LA HANDYPERSON FUNDING RECEIVED

2 Information about How LA Handyperson Funding Was Spent By Each Service Provider

Questions 2.1 and 2.2 Please state the amount of handyperson funding received from the LA in 2009/10 and 2010/11. If you received none in 2009/10, please write zero at question 2.1.

Question 2.3 Please indicate how many months in 2010/11 are covered by this funding.

Question 2.4 Please state the amount of LA handyperson funding received from the LA spent in 2010/11.

Question 2.5 Please indicate how many months in 2010/11 are covered by this spend.

Question 2.6 Please indicate what is the planned spend for the whole of 2010/11 on handyperson services.

Question 2.7 We are interested in whether LAs are intending to fund handyperson services in 2011/12. Please indicate whether you will be receiving funding from your LA, and if so by how much it will be less or more than the funding received in 2010/11.

Question 2.8 We are also interested in whether local health services are intending to fund handyperson services in 2011/12. Please indicate whether you will be receiving funding from local health services, and if so by how much it will be less or more than any such funding received in 2010/11.
Questions 2.9 and 2.10 We are interested in how service providers will respond to changes in future funding levels, whether this be a reduction or increase in funding compared to previous years. Please indicate how you are planning to respond to either of these scenarios, and do give us any additional information.

Question 2.11 We are interested in any planned changes to your business model for 2011/12 onwards, and how overall you plan to deliver your services.

3 Information about Clients or Households

Question 3.1 Service providers can provide data about total numbers of clients and/or households that have benefitted from LA handyperson funding in 2010/11. It is possible that no additional clients or households benefitted, for example if the funding was used to set up the service. If this is the case, please put zero, and give a brief explanation at question 3.3.

Question 3.2 Please indicate how many months are covered by the information on visits given at question 3.1.

Question 3.3 If no clients or households benefitted from funding during 2010/11, please provide an explanation.

4 Charging for Services

Question 4.1 We are aiming to collect information about whether and through what mechanisms recipients of LA funded services are charged for handyperson services. Examples of charging policies and criteria include: a flat fee (if so what is this fee) to all clients; means tested with a charge to those above a certain income level (if so what is this level and what are the charges made to those who do pay); and payment for consumables only (if so what consumables). Several of these policies and criteria may be in place, in which case please describe all of these. If you have already provided this information to us in your previous survey response, just indicate that you have done so.

Question 4.2 Please indicate whether your changes cover the full cost of delivering the service to a client or are subsidised.

Question 4.3 Please indicate whether you intend to charge for handyperson services in the future and if so what charging mechanisms do you intend to adopt.

SECTION D OTHER INFORMATION

Please provide briefly any other information that you feel is relevant or helpful to the evaluation (maximum 100 words).

Please send your completed surveys to Dianne Wright on dianne.wright@york.ac.uk, or use our web enabled survey form.

If you have any queries please do not hesitate to contact Dianne on 01904 323626.
APPENDIX D

Topic Guides Used in Case Study Interviews
NATIONAL EVALUATION OF THE HANDYPERSON PROGRAMME

PHASE 3: CASE STUDIES

Topic Guide for Service Providers Receiving Part A Funding Only

1. Background and role of the key informant

What is your job? ______________________________________________________

Which organisation do you work for? _________________________________________

How long have you worked for [organisation]? ________________________________

How long have you been involved with this handyperson service? ___________

2. Model of service delivery

In the “Future Home Improvement Agency”, a number of different service models were described. Which if these models are closest to the model your service operates?

Prompt: Range of services provided, numbers of staff, employees versus contractors, use of volunteers.

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What led you to adopt this particular model of service?

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What do you think are the advantages and/or disadvantages of this model as compared to others?

Are service users involved at all with the management of the service, for example, through a service user group that provides regular feedback or has assisted with key decisions, for example, around setting charges for services?

3. **Use of Part A funding**

Can you describe the additional services that have been supported by Part A funding?
*Prompt: new service or service extended to areas where previously was no service; new types of work or jobs can be offered, quicker response times, additional clients.*

What difference has Part A funding made to your service?
*Prompt: Additional staff and their roles, whether different types of needs can now be met, waiting times for services reduced, better equipment and tools, training for staff.*
Are there any differences in how you originally intended to use Part A funding, and how you are using the additional monies?  
*Prompt: what are the reasons for the differences/changes?*


Part A funding is time limited. What plans do you have to continue the service in the future?  


What will you be doing (or have already done) to achieve this?  
*Prompt: Any apparent risks to the service continuing, and how these are being addressed?*


Bringing in funding from different streams, for example, social care, Supporting People etc.? Although the new localism agenda is still developing, what are your thoughts about what localism means for handyperson services?
4. **About your clients?**

Thinking specifically about the services that the Part A money has been used to develop or support is it possible to describe a “typical” client or job?
*Prompt: age, disability or impairment, living alone/with others, tenure, types of housing, type or work required.*

Could you talk me through a “typical client journey” from when they first contact the service?
*Prompt: Client journey from referral/first contact, assessment, work carried out, follow up?*

What would be a “successful” outcome for a typical client?
*Prompt: job completed to client’s satisfaction, follow up or link into other services, people enabled to be more independent, more secure, and warmer, know that service is available to help them in the future.*

Do you undertake any client satisfaction surveys or follow up with clients to see what difference the service has made to them?
*Prompt: what kinds of things do the surveys ask/follow up indicate, how does the service respond?*
What do you think are the things that clients most value about the service?

Are there any upper limits on the service that any one individual can receive? For example, can people make only a certain number of requests for help over a specified time frame? 
*Prompt: is there a typical ‘repeat’ customer? How does the service control demand from particular individuals?*

Do you think there are any particular groups of people who would benefit from the services who currently do not ask for help? 
*Prompt: how do you think you could help such groups access the service?*

Are there any types of requests for help that your handyperson service cannot address? 
*Prompt: What are the difficulties: for example…*

   - Need a skilled contractor such as an electrician/ registered gas fitter etc.
   - Response times (for example, out-of-hours service to facilitate hospital discharge at weekend)
   - Lack of understanding of what service can do/inappropriate referrals?
   - Other?

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5. **Charging**

Do you charge your clients for services?

**Yes** □

**No** □

**If YES:**

Can you explain about the charging mechanism (i.e. flat rate, charge per hour, per job etc, means tested, some elements free and others paid for; subscription model?)

*Prompt: Has the service always charged, and if not, why did they introduce charges? Have service users been involved in setting the rates charged?*

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Do clients ever comment on the service charges?

*Prompt: Expensive/cheap, good value for money, don’t expect anything for free, would prefer to pay etc., prefer a “trusted” organisation rather than worried about charges, etc; any changes in client feedback following charges.*

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Are you thinking about making any changes to the way you charge for the service? And if so, why are you considering changes?

*Prompt: increase/reduction; different rates for different jobs, etc.*

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Some handyperson services do not charge – do you have a view on charging or not for services?

If NO:

Why is there no charge for clients for services?
Prompt: Don’t want to discourage people from using the service, is more costly/complicated to put in charging mechanism than not to have one, other?

Are you considering charging clients for services in the future, and if so, why, and how do you think this will impact on the service?
Prompt: What type of charging mechanisms are being considered? Have service users been involved in setting the rates charged?

6. Factors contributing to success

What do you think contributes to making the handyperson service successful?
And what, if any, factors constrain the service?

How do you demonstrate success to your commissioning body? Do you have any targets that you have to meet, or service objectives set?
*Prompt: what type of data collected and key variables, how often, where submitted?*

What do you think are the best ways of demonstrating the “success” or “value” of the service?

Are you aware of the Financial Benefits Toolkit that Foundations have developed recently? Have you used it?
*Prompt: If not aware, direct people to Foundations (and relevant web address/contact person).*
Who or what organisations are most influential in supporting the sustainability of handyperson services?

*Prompt:* How much contact does the service have with these individuals or organisations, and how does the service work to influence them, or keep them informed about the benefits the service provides?

7. **Additional information about services**

We have [list whatever supporting information that has already been sent]. Do you have any additional information that might support and inform the Evaluation? For example: client satisfaction surveys, future strategy documents.

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Appendix D
NATIONAL EVALUATION OF THE HANDYPERSON PROGRAMME

PHASE 3: CASE STUDIES

Topic Guide for Service Providers Receiving
Part A and Part B Funding

1. Background and role of the key informant

What is your job? ________________________________________

Which organisation do you work for? _______________________

How long have you worked for [organisation]? _______________

How long have you been involved with this handyperson service? __________

2. Model of service delivery

In the “Future Home Improvement Agency”, a number of different service models were described. Which if these models are closest to the model your service operates?

Prompt: Range of services provided, numbers of staff, employees versus contractors, use of volunteers.

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What led you to adopt this particular model of service?

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What do you think are the advantages and/or disadvantages of this model as compared to others?

Are service users involved at all with the management of the service, for example, through a service user group that provides regular feedback or has assisted with key decisions, for example, around setting charges for services?

3. Use of Part B funding

Can you describe the additional services that have been supported by Part B funding?

What difference has Part B funding made to your service?

*Prompt: Additional staff and their roles, whether different types of needs can now be met, waiting times for services reduced, better equipment and tools, training for staff.*
Are there any differences in how you originally intended to use Part B funding, and how you are using the additional monies?
Prompt: what are the reasons for the differences/changes?

Has demand for the service been as predicted?
Prompt: more or less and possible reasons, also whether different or unexpected types of clients have come into the service.

What plans do you have to continue the service in the future? What will you be doing (or have already done) to achieve this?
Prompt: Any apparent risks to the service continuing, and how these are being addressed?

Bringing in funding from different streams, for example, social care, Supporting People etc.?
Although the new localism agenda is still developing, what are your thoughts about what localism means for the service?

4. About your clients?

Thinking specifically about the services that the Part B money has been used to develop or support is it possible to describe a “typical” client or job?
*Prompt: age, disability or impairment, living alone/with others, tenure, types of housing, type or work required.*

Could you talk me through a “typical client journey” from when they first contact the service?
*Prompt: Client journey from referral/first contact, assessment, work carried out, follow up?*

What would be a “successful” outcome for a typical client?
*Prompt: job completed to client’s satisfaction, follow up or link into other services, people enabled to be more independent, more secure, and warmer, know that service is available to help them in the future.*
Do you undertake any client satisfaction surveys or follow up with clients to see what difference the service has made to them?

*Prompt: what kinds of things do the surveys ask/follow up indicate, how does the service respond?*

What do you think are the things that clients most value about the service?

Do you think there are any particular groups of people who would benefit from the services who currently do not ask for help?

*Prompt: how do you think you could help such groups access the service?*

Are there any types of requests for help that your handyperson service cannot address?

*Prompt: What are the difficulties: for example…*

- Need a skilled contractor such as an electrician/registered gas fitter etc
- Response times (for example, out-of-hours service to facilitate hospital discharge at weekend)
- Lack of understanding of what service can do/inappropriate referrals?
- Other?

_____________________________________________________________
5. Charging

Do you charge your clients for services?

Yes ☐
No ☐

If YES:

Can you explain about the charging mechanism i.e. flat rate, charge per hour, per job etc, means tested, some elements free and others paid for; subscription model):
Prompt: Has the service always charged, and if not, why did they introduce charges? Have service users been involved in setting the rates charged?

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Do clients ever comment on the service charges?
Prompt: Expensive/cheap, good value for money, don’t expect anything for free, would prefer to pay etc, prefer a “trusted” organisation rather than worried about charges, etc; any changes in client feedback following charges.

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Are you thinking about making any changes to the way you charge for the service? And if so, why are you considering changes?
Prompt: increase/reduction; different rates for different jobs, etc.

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Some handyperson services do not charge – do you have a view on charging or not for services?

If NO:

Why is there no charge for clients for services?
*Prompt: Don’t want to discourage people from using the service, is more costly/complicated to put in charging mechanism than not to have one, other?*

Are you considering charging clients for services in the future, and if so, why, and how do you think this will impact on the service?
*Prompt: What type of charging mechanisms are being considered? Have service users been involved in setting the rates charged?*

6. Factors contributing to success

What do you think contributes to making the handyperson service successful?
And what, if any, factors constrain the service?

How do you demonstrate success to your commissioning body? Do you have any targets that you have to meet, or service objectives set?

Promt: what type of data collected and key variables, how often, where submitted?

What do you think are the best ways of demonstrating the “success” or “value” of the service?

Are you aware of the Financial Benefits Toolkit that Foundations have developed recently? Have you used it?

Prompt: If not aware, direct people to Foundations (and relevant web address/contact person).
Who or what organisations are most influential in supporting the sustainability of handyperson services?

*Prompt: How much contact does the service have with these individuals or organisations, and how does the service work to influence them, or keep them informed about the benefits the service provides?*

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NATIONAL EVALUATION OF THE HANDYPERSON PROGRAMME

PHASE 3: CASE STUDIES

Topic Guide for Handyperson/Contractors

1. How long have you been working for the service?
   Prompt: have they always worked in the building industry – do they have particular skills – decorating, electric, plumbing etc?

2. Why appealed to you about the job?

(If a private contractor) How did you get to be doing this work?
Prompt: why do they do it, is it profitable.

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3. **Do you like your job?**
   *Prompt: levels of job satisfaction, feel that is “more than just doing the job”, and issues about trust, social isolation etc.*

   (If private contractor) Do you like doing the contracts for the HP services?
   *Prompt: levels of job satisfaction, feel that is “more than just doing the job”, and issues about trust, social isolation etc.*

4. **How does working for the service compare to where you’ve worked before?**
   *Prompt: do clients need “more” attention, more patience, do handypersons need different skills to deal with people who are elderly or disabled?*

   (If private contractor) How does working for the service compare to the other work you do?
   *Prompt: do clients need “more” attention, more patience, do handypersons need different skills to deal with people who are elderly or disabled?*
5. Can you describe a typical day?

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6. Can you describe a typical client?

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7. Why do you think people use this service rather than simply getting someone in privately to do the work for them?
Prompt: trust the service, can’t afford full price…

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8. do people ever comment on the charge for the service?
Prompt: Too much, glad to pay.

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9. Do you offer people information about other services – or ask if they would like help with anything else?  
*Prompt: how do people respond to that? Do they welcome it, or think it's intrusive. How does the handyperson feel about asking people if they need help – happy to do it, or uncomfortable?*

10. What do you think make a service like this successful?

11. Are there any types of work you get asked to do, but can't do?  
*Prompt: what exactly, where do they direct people for help, is there room for the service to develop to offer those things that currently can't offer*

12. Anything you would like to add?
NATIONAL EVALUATION OF THE HANDYPERSON PROGRAMME

PHASE 3: CASE STUDIES

Topic Guide for Service User Interviews

1. Can you tell me a little bit about yourself and where you live?
   Prompt: about living alone, age, what type of property, how long have been living there, tenure, and type of area?

2. What made you/other contact the handyperson service?
   Prompt: nature of problem, how long they had been in difficulties, how they coped, and how much disruption or worry caused, where if anywhere else they had sought help.

3. How did you find out about the handyperson service?
   Prompt: self, family, or professional, other information
4. Was it easy to get information about the service and who to contact?

5. So, once you got in touch with the service, can you tell what happened next?
   - How quickly responded?
   - What they did? How many times they visited?
   - Happy with the work?
   - Attitude of the workmen?

6. Did you pay anything towards the work?

If yes: did you think it was value for money/expensive/should be free/would be prepared to pay more
If no: do you think the service should be free, or would you be prepared to pay for the service.

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7. Was it [whatever work was done] what you wanted?
   Prompt: how much choice/control they had over what was done

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8. In what ways has the work made a difference to you?

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9. Were there things you wanted help with, but couldn’t be done by the service?

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10. Did the person who visited/case worker suggest any other services that might be able to help you?
Prompt: did you welcome the advice? Have you taken that advice? Have you had any additional services as a consequence?

11. What would you have done if you hadn’t got in touch with the handyperson service?
Prompt: would family and/or friends have done the work? Would you have paid someone to do the work? Would you not have had the work done?

12. Would you use the service again or recommend it to someone else?
If not, why? If yes, why?

13. Are there any ways you can think of that the service could be improved?
Prompt: different types of services.
14. Is there anything else you would like to add?

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