



THE
MERCERS'
COMPANY

Combating Loneliness

Review of activity supported by the
Mercers' Company's Older People
and Housing Programme

Report of findings



The Mercers' Company is a Livery Company focused on being a philanthropic force for good.

The Older People & Housing programme is one of three major grant-making programmes run by the Mercers' Company and the three charities of which it is trustee.

One of the priorities of the programme is to tackle loneliness in older people. 51 grants have been made in support of this priority between 2018 and 2020.

The Company commissioned this review to understand the difference made by these grants and to advise us on how we could improve the effectiveness of our reporting going forward.

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Front cover image – Southwark Playhouse

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Summary

This review examines what is known about the impact of grants awarded from the Mercers' Charitable Foundation, the Charity of Sir Richard Whittington and the Earl of Northampton's Charity as part of the Mercers' Company's Older People & Housing programme 'combatting loneliness' funding priority. This funding supports organisations in London and Norfolk which are working to address loneliness in older people by:

- Working in areas with a high risk of chronic loneliness – defined as areas with high levels of deprivation, a high proportion of minoritised communities, or a high percentage of older adults living alone
- Providing opportunities for older adults to foster new connections
- Providing opportunities to support and maintain existing relationships

The review's findings are primarily based on assessment of documentation relating to fifty-one grants awarded through this priority area between 2018 and 2020. This information was supplemented by eleven interviews with Mercers' Company grant holders, committee members and staff.

How was funding used?

The funding provided through the Older People & Housing programme was primarily used to provide group activities and / or one-to-one befriending support to older adults.

In some cases funding supported the development of new activities; in others it enabled the adaptation of an existing service to meet the needs of a new group; in others it supported expansion into new geographical areas. In many cases funding was used to bolster grant holders' core provision.

Most organisations funded were mid-sized charities, who received grants in the range of £50,000 to £100,000 over the course of two or three years. Most grant holders were local organisations working in areas of London or in Norfolk, but a small number were national organisations delivering in London / Norfolk.

Group activities and one-to-one befriending support are 'core' responses to loneliness and social isolation, but funding also enabled activity to:

- Help people develop new knowledge and skills
- Provide information, advice and signposting
- Support volunteering

The funding also helped to develop the capacity of organisations through work to:

- Improve internal systems and processes
- Upskill staff and volunteers

In addition to funding delivery, the Older People & Housing programme also supported a number of infrastructure organisations working with organisations that address loneliness. These organisations help to make the case for addressing loneliness and build the evidence around what works, thereby bolstering the capacity of the wider sector. This is vital work, and the contribution the Mercers' Company makes to it is a strength of the Company's approach.

The impact of the Covid-19 pandemic

As grants were typically awarded over a period of at least two years and more commonly three, and the earliest started in 2018, almost all grant holders undertook some of their delivery in the context of the Covid-19 pandemic. The Older People & Housing programme took a proactive approach to supporting their grant holders to adapt to the conditions of the pandemic. This enabled organisations to adapt their offer to meet their local needs and circumstances. Most started to provide remote support and some organisations saw significant increases in demand for their support.

The pandemic meant most organisations delivered in different ways than they originally envisaged, and many were less able to collect data on their impact as a result of the pandemic.

Organisations report a range of challenges in their progress reports. Among those whose delivery spanned the onset of the Covid-19 pandemic (most of the sample), adaptation to deliver during the pandemic was the biggest challenge. The key issues included:

- The need to halt face-to-face delivery
- The challenges of adapting delivery to work to online or telephone support – which often brought up front costs, and in some cases meant provision was more labour-intensive on an ongoing basis
- Changes in demand for support – some organisations saw significant increase in demand for support, but a small number of organisations reported a slowdown in referrals often linked to the pressures on referring organisations
- Increasing complexity of needs
- Lack of digital skills / connectivity / access among clients, which meant that some people could not be supported

Beyond the Covid-19 context, the biggest challenges were linked to staffing. The willingness of organisations to set out challenges and propose mitigations suggests that they have a trusting relationship with the Mercers' Company.

What is known about impact?

There is a high degree of variation in the outcomes reported on by grant holders in their annual progress reports. This is because the Older People & Housing programme has adopted a flexible and light touch approach which is laudable given the size and capacity of the organisations being funded. However we can see some themes across the portfolio:

- Most organisations commit to an outcome around **reducing loneliness and social isolation** – the majority say that the older people they serve / work with will feel less lonely
- Many organisations additionally commit to **improving wellbeing** – or aspects of wellbeing such as feelings of confidence – among the older people with whom they work
- Some set targets around **reach** – either a number of people who will be involved, an increase in participant numbers overall, or in some cases increased reach among particular groups
- Many report on **delivery of activities** as an outcome
- Many share survey data, testimonials or case studies which suggest a **high degree of satisfaction among those receiving support or engaging with the projects** with the help they received



Queen's Crescent Community Association

- Several organisations report on outcomes around **volunteering** – often a target for recruiting volunteers
- Several grant holders select **organisational developments** as outcomes – e.g. setting up a new service or implementing a new way of working (e.g. new training)

The majority of grant holders report that they have met or exceeded their targets. The main success measures offered are details of delivery – i.e. the numbers of participants engaged, and the number and nature of activities being delivered. Many organisations supplement this with reported feedback or observation, sometimes including testimonial quotations or case studies.

Over half of organisations report on findings from surveys – usually selecting a handful of results to report, such as “x% said that participating in y activity made them feel less lonely”.

A small number of organisations mentioned using formal measures to assess impact, or using tools such as goal setting frameworks. More organisations planned to use wellbeing measures than loneliness measures, although not all were able to report on these measures in their final reports. In the end, no grant holders included results from formal loneliness measures in their reporting, and only handful included wellbeing measures.

The lack of consistency in terms of outcomes and data means that it is **not possible to provide an aggregate statement of the impact of the funding awarded through this priority area**. However, it is clear from reviewing individual reports **that grant holders are doing useful and valuable work. This is making a difference to older people in a range of places and across a range of issues**. Across the programmes delivered, we see:

1. Funding is supporting **additional delivery of interventions** that are known to have an impact on the lives of people who experience loneliness and isolation – i.e. group-based activities and one-to-one befriending
2. Funding is helping organisations **reach more people** including in some cases enabling work with previously unserved or underserved communities – e.g. older people from ethnic minorities and people with dementia

3. Funding is supporting the **creation of and support for volunteering roles** which will impact individual and community wellbeing
4. Funding is helping more **organisations get better at what they do** – developing their organisational skills and capacity

In addition, through its funding for infrastructure organisations – including the Campaign to End Loneliness; the UK Men’s Shed’s Association; and a small number of other national organisations which deliver infrastructure support to their wider networks (often alongside direct delivery) – the Older People & Housing programme has contributed to building the evidence for interventions, supporting the development of practice and making the case for work on loneliness. These are critical roles, but ones which are not always well supported by other funders.

Conclusions

The funding provided by the Mercers’ Company’s Older People and Housing programme’s loneliness priority has supported the delivery of critical support to older adults affected by loneliness and social isolation. There is good reason to **be confident that this will have had a positive effect on those reached**.

The Mercers’ Company plays an **important role in the funding landscape around loneliness** interventions for older adults, funding a wide range of activity provided by mid-size charities. This is not an area in which many funders are engaged. The Mercers’ Company should therefore ensure that any decisions it makes around its future funding priorities and its approach to monitoring and evaluation are compatible with maintaining the breadth of the portfolio and the offer of funding to charities with limited capacity. It should also prioritise continuing to build positive relationships with its grant holders and minimising the bureaucratic burden of its grant processes.

However, there may be opportunities for it to provide clearer guidance to its grant holders around defining outcomes for the work for which they seek funding, and around its approach to reporting, to enable it to gather a more consistent set of data to inform its own understanding of its impact.

Recommendations for improving understanding

From our review of the existing evidence being gathered by grant holders a few broad lessons emerge:

- Grant holders are consistently able to report on the **activities** they have delivered and generally have a range of data around the **participants** engaging with their offers
- Many grant holders administer some form of **survey** or questionnaire among their beneficiaries
- Many grant holders collect **testimonials, case studies and other feedback** to demonstrate their impact
- There is greater familiarity among grant holders with **wellbeing measures** than with loneliness measures
- Allowing grant holders to define their own outcomes leads to a **high degree of inconsistency** across the outcomes being reported on; and the measures used to assess progress against those outcomes are also highly varied

Our review, and subsequent discussions with grant holders, committee members and staff, identified that there may be potential to adjust reporting processes to better support understanding of the impact of the Mercers’ Company investment. However, the impact of these changes should be carefully considered, and efforts

made to avoid unintended consequences. **Key principles that should inform any future approach include:**

- **Minimising bureaucratic burden on** grant holders
- Supporting **a broad portfolio** including infrastructure development across the loneliness field; capacity building within organisations; and a huge diversity of different kinds of support for older adults across a range of communities and settings and with a wide range of needs
- Supporting **mid-sized organisations** which are at the heart of the response to loneliness in communities

As any new approach to impact measurement is developed the following key **insights** should be considered:

- The Mercers' Company's **funding is primarily being used to support tried and tested interventions to address loneliness** – we do not need to reassess their impact on loneliness as there is already evidence around this.
- Grant holders value being able to **define the outcomes** they will achieve and would be concerned about being asked to work to an externally selected set of outcomes
- Grant holders prefer to **share data that is already being collected** across the organisation
- The **relational and trust-based approach** is valued

There may be opportunities to simplify reporting requirements in future including by:

- **Clarifying guidance** to grant holders around how to choose and express outcomes, outputs, targets and measures in their grant documentation
- Being explicit that **re-proving the impact of 'tried and tested' interventions is not required**
- Being explicit about the Company's interest in understanding how grant holders are using funding to **develop their capacity**

In addition the Company could **share information about validated tools for measuring impact on loneliness / wellbeing** and encourage their use, where appropriate, and if grant holders choose to do so noting that this would likely only be appropriate and desirable in limited circumstances e.g. where a new approach is being tested).

Beyond this simplification the Mercers' Company could consider further work to develop new approaches to deepening its impact. Areas for exploring include:

- Providing a clearer framework for reporting **participant data**
- Creating a framework for reporting on **organisational development**
- Building on **relationships** between grant holders and the Company, and drawing insights from these
- Supporting **capacity building** including through peer networks

Background to the review

In 2018 the Mercers' Company took a strategic decision to focus grants given from the Mercers' Charitable Foundation, the Charity of Sir Richard Whittington and the Earl of Northampton's Charity under its 'Older People and Housing' priority, on two issues – providing housing solutions and combatting loneliness among older people. This report focusses on what has been achieved under the 'combatting loneliness' funding priority.

The Mercers' Company funds organisations in London and Norfolk which are working to address loneliness by:

- Working in areas with a high risk of chronic loneliness – defined as areas with high levels of deprivation, a high proportion of minoritised communities, or a high percentage of older adults living alone.
- Providing opportunities for older adults to foster new connections
- Providing opportunities to support and maintain existing relationships

This review is based on assessment of documentation relating to fifty-one grants awarded from this fund between 2018 and 2020 – these included grant applications, project plans and progress reports submitted to the Company as well as internal reports for the funding committee. In total the Mercer's Company has awarded £4.2million under this priority.

The aim is to understand

- What is known about the impact of the overall programme on loneliness
- Key themes emerging from across the programme which can inform approaches to addressing loneliness
- What lessons could be learnt around how to track the impact of work to address loneliness



Highgate Newtown Community Partners

What did the Older People & Housing programme fund?

Most grant holders used their funding to part fund the delivery of group activity and / or one-to-one support for older adults who were socially isolated. Thirty-seven grant holders used the funding to provide group-based activities; twenty-two used the funding to provide one-to-one support (usually in the form of a befriending visit or call from a volunteer), some organisations offered both.

In some cases funding supported the development of new activities – a new arts-based programme or a new physical activity class, for example, in others the funding enabled the adaptation of an existing service to meet the needs of a new group – for example people with dementia or other long-term conditions; in some cases it supported expansion into new geographical areas. However in many cases funding was used to bolster grant holders' core provision.

Most of the grants awarded under this fund supported direct delivery of support to older people, but there were a small number of grants given to support other work – including the Campaign to End Loneliness and the UK Men's Shed's Association. These are not delivery organisations, instead funding provided infrastructure support to wider networks. Other grants primarily supported development activity within delivery organisations – for example creating a new programme for people with rare forms of dementia, or developing the work of the Anna Chaplains. The majority of findings and reflections here relate to the impact of work funded by delivery organisations however we offer some reflections on the importance of funding infrastructure support and development towards the end of this report.



Southwark Playhouse

Most organisations funded were mid-sized charities – with an overall turnover of between £300,000 and £1m – and the grants provided were typically in the range of £50,000 to £100,000 over the course of two or three years. The majority of grants cover part project costs / a proportion of core costs, but given the scale of the

organisations and the grants awarded the Mercers' Company is a *significant* funder for the majority of its grant holders. Most grant holders were local organisations working in areas of London or in Norfolk, but a small number were national organisations delivering in London / Norfolk. Some organisations worked with sub-groups of the older population – for example, four carers' organisations were funded – and some grants were focussed on provision for particular groups – for example, five projects had an explicit focus on people with dementia.

Group activities and one-to-one befriending support are 'core' responses to loneliness and social isolation. It is therefore unsurprising that these represent a significant part of grant holders' delivery. Other types of support funded through this programme were:

- Supporting skills development – Several grant holders used funding to create opportunities for older adults to develop skills – for example, around their roles as carers or in managing long-term conditions that may affect them. This was often delivered through informal groups sessions rather than formal learning; several grant holders supported older adults to develop digital skills – sometimes as part of their pandemic response (within an adapted programme)
- Providing information, advice and signposting – Several grant holders provided information and advice to the older people they supported, for example around accessing other support and entitlements, or other opportunities in their communities; several also mentioned developing links with other organisations in the community to support onward referrals
- Supporting volunteering – Most grant holders work with volunteers to deliver aspects of their programmes, and several capture their progress in recruiting, training and retaining volunteers as part of their reporting

Another important area of work enabled through the Mercers' funding is developing the capacity of organisations delivering support, in particular through work to:

- Improve internal systems and processes – For example improving impact measurement, developing new links with partner organisations, or developing new ways of communicating
- Upskill staff and volunteers – Several organisations delivered updated training, and many adapted their training and onboarding processes to be delivered online during the pandemic

Impact of the pandemic

The Covid-19 pandemic had a significant impact on most organisations funded under the programme's loneliness priority. As grants were typically awarded over a period of at least two years and more commonly three, and the earliest started in 2018, almost all grant holders undertook some of their delivery in the context of the pandemic.

The Mercers' Company took a proactive approach to supporting their grant holders to adapt to the conditions of the pandemic, lifting restrictions on how funding could be spent during the response. In addition, the Company provided emergency funding of up to £10k for existing grant holders via its Rapid Response Fund.

As most organisations offered face-to-face support prior to the pandemic, rapid adaptation was required. Many organisations moved support to the telephone and / or online – offering group sessions via Zoom and supporting others, including those who could not access Zoom, via the telephone – usually offering one-to-one support.

Several organisations, in particular those working from recognised community hubs with a generalist offer, became involved in practical aspects of crisis response including providing food and medication.

Many organisations saw substantial increases in demand for their support and found they needed to support people with increasingly complex needs.

Delivery during the pandemic

The flexibility offered by the programme gave organisations space to adapt their approaches to meet the needs of their service users, being responsive to their local circumstances and their position within their local systems of support. For some this meant massively ramping up delivery, for others it meant adapting to deliver in new ways. Some organisations welcomed significant influxes of volunteers and were able to increase the numbers of people supported.

The flexible funding offered during the pandemic meant that support to people at risk of or experiencing loneliness and social isolation continued during a critical period at which the overall burden of loneliness and social isolation was increasing across society. It also enabled some organisations to reach new individuals in need and to develop new ways of working that will continue beyond the pandemic.

The impact of the pandemic on outcomes achieved

Some grant holders were quicker than others to adapt and this had an impact on the extent to which organisations were able to meet the goals originally envisaged for their grant delivery. However all those whose delivery spanned the onset of the pandemic had to adapt their plans in some ways, meaning the numbers reached and the ways in which support was delivered were usually different than originally envisaged.

Furthermore many organisations struggled to collect data during the pandemic – some felt it was not appropriate to undertake surveys in the context of remote support, others lacked practical ways to do so, or did not have the capacity to undertake planned evaluation. However, the testimonials shared by grant holders suggest the support delivered during the pandemic was highly valued and critically important to those who received it.

From the perspective of this review, it is important to note that the shifts forced by the pandemic mean that it is difficult to plot a course from the original intentions of these grant holders, and the goals they set at the outset, to the activities ultimately delivered and the outcomes achieved.

What difference did the programme make?

What outcomes are reported on?

The Mercers' Company sought deliberately to make its application and reporting processes light touch, to reduce the burden on grant holders. Given the relatively small size of the organisations being funded, this is a laudable and important approach.

While grant holders need to demonstrate the alignment of their plans with the Older People and Housing programme's priorities, it is left to them to define the outcomes against which their delivery should be assessed, and to explain how the outcomes they select will be achieved through the proposed activity. Grant holders are also asked to set out how they will measure their impact. This approach is part of a deliberate attempt to minimise the bureaucratic burden placed on grant holders by the Mercers' Company – as it means that organisations can share data that is meaningful to them, and collect data in ways that work for them. It is also consistent with the Mercers' Company's desire to respect the expertise of their grant holders in working with and for their communities – recognising that they are best placed to identify and articulate the difference they will make.

In practice, though, this means there is little consistency across the outcomes selected by different grant holders. However in reviewing the documentation there are some patterns:

- Most organisations commit to an outcome around **reducing loneliness and social isolation** – the majority say that the older people they serve / work with will feel less lonely
- Many organisations additionally commit to **improving wellbeing** – or aspects of wellbeing such as feelings of confidence – among the older people with whom they work
- Some set targets around **reach** – either a number of people who will be involved, an increase in participant numbers overall, or in some cases increased reach among particular groups
- Many report on **delivery of activities** as an outcome
- Several organisations report on outcomes around **volunteering** – often a target for recruiting volunteers
- Several grant holders select **organisational developments** as outcomes – e.g. setting up a new service or implementing a new way of working (e.g. new training)

What has been achieved?

The majority of grant holders report that they have met or exceeded their targets. The main success measures offered are details of delivery – i.e. the numbers of participants engaged, and the number and nature of activities being delivered. Many organisations supplement this with reported feedback or observation, sometimes including testimonial quotations or case studies.

Over half of organisations report on findings from surveys – usually selecting a handful of results to report, such as “x% said that participating in y activity made them feel less lonely”.

A small number of organisations report using formal measures to assess impact, or using tools such as goal setting frameworks. Formal wellbeing measures such as the short Warwick Edinburgh Mental Wellbeing Scale (WEMWBS) are more commonly



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used than loneliness measures, such as the short (three-item) UCLA loneliness scale.¹ In fact no grant holders included results from formal loneliness measures in their reporting.

Results of measurement are not always reported in detail– for example one organisation using WEMWBS reported the percentage of participants seeing an improvement in their scores but did not provide detail about the scale of change or clients' original levels of wellbeing.

It is also important to note that most of the evidence submitted to demonstrate impact is from internal monitoring processes – there were only two organisations that shared data from independent evaluations (usually funded separately to their Mercers'-funded programme), and one referred to its survey results being independently analysed.

The lack of consistency in terms of outcomes and data means that it is not possible to provide an aggregate statement of the impact of the programme's funding. However, it is clear from reviewing individual reports that grantees are doing useful and valuable work. This is making a difference to older people in a range of places and across a range of issues. Across the programmes delivered, we see:

- A significant number of **older adults participating in group or one-to-one activities** around which there is existing evidence of impact on loneliness and / or isolation
- Organisations increasing their **reach into new communities**, and working with **groups at significant risk of loneliness** (e.g. people with dementia, carers, people from ethnic minorities)
- Organisations receiving **high levels of positive feedback** about the impact of their services (both through testimonials and in surveys)
- Some older adults benefiting from approaches that demonstrably **improve their wellbeing**
- Organisations delivering other benefits to the people with whom they work including **improving knowledge and skills and creating links to other organisations**
- Organisations improving their own **organisation skills and capacity**
- Organisations demonstrating a high degree of **adaptability** in challenging contexts

¹For information on the Warwick Edinburgh Mental Wellbeing Scale see: <https://warwick.ac.uk/fac/sci/med/research/platform/wemwbs>; For information on the UCLA 3 scale see: <https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/methodologies/measuringlonelinessguidanceforuseofthentationalindicatorsonsurveys>

What were the challenges encountered?

Organisations report a range of challenges in their progress reports. Among those whose delivery spanned the onset of the Covid-19 pandemic (most of the sample), adaptation to deliver during the pandemic was the biggest challenge. The key issues included:

- The need to halt face-to-face delivery
- The challenges of adapting delivery to work to online or telephone support – which often brought up front costs, and in some cases meant provision was more labour-intensive on an ongoing basis
- Changes in demand for support – some organisations saw significant increase in demand for support, but a small number of organisations reported a slowdown in referrals often linked to the pressures on referring organisations
- Increasing complexity of needs
- Lack of digital skills / connectivity / access among clients, which meant that some people could not be supported

Beyond the Covid-19 context, the biggest challenges were linked to staffing – variously issues recruiting staff or loss of key staff for a range of unavoidable reasons (bereavement, ill-health etc) – and challenges in establishing relationships with referral agencies.

Across the piece organisations demonstrated a willingness to acknowledge challenges they were facing and proposed sensible mitigations to address their impact. This suggests that they had a relationship of trust with the Mercers' Company and felt confident that sensible adjustments to their plans would be accommodated.

What do we know about impact?

The lack of consistency in terms of outcomes and data being collected and shared with the Mercers' company, and the fact that information cannot be independently verified means that it is not possible to provide an aggregate statement of the impact of the Mercers' funding.

There is wide variation in:

- The outcomes reported against – with some choosing to report against an overall change for clients; some reporting against delivery; and some choosing more granular targets
- The measures used to assess outcomes – a wide range of different evidence is used to justify the overall assessment of whether outcomes have been achieved from information from surveys, to staff observations, to general feedback, through to participant numbers and confirmation that activities have been delivered
- The data reported – even where organisations report on the same kinds of things e.g. participant numbers there is a lack of consistency with regard to whether these relate just to the specific activities funded by the programme or the organisations' overall work. There is also a variation in the detail provided – for example whether organisations provide a demographic breakdown of participants, and whether their records distinguish between regular or long-term participants / service users and those who may access a one-off event.

However, it is clear from reviewing individual reports that **grant holders are doing useful and valuable work. This is making a difference to older people in a range of places and across a range of issues.** Across the portfolio we can see:

1. Funding is supporting **additional delivery of interventions** that are known to have an impact on the lives of people who experience loneliness and isolation

Group-based activities are a well-evidenced intervention to support people who are experiencing loneliness and isolation. Reviews of the evidence have shown that group-based activities enable older people to build social connections and can help them to become less lonely.² There is some nuance in the evidence around the kinds of group activities that may be most effective in addressing loneliness, but overall funders of group-based activities can feel confident that this will lead to positive impacts for the people involved. This will be particularly the case where the groups being engaged are more likely to be experiencing loneliness and social isolation.

The evidence around one-to-one befriending is less clear in terms of a direct impact on levels of loneliness among the individuals supported but, as the Mercers' Company's own evaluation of befriending showed, these services are a critical loneliness intervention for a group which are not well-supported by other services (<https://www.mercers.co.uk/older-people-housing-research-into-befriending>). Furthermore these services have been an even more important source of support during the pandemic.³

2. Funding is helping organisations **reach more people** including in some cases enabling work with previously unserved or underserved communities

As noted above grant holders have used funding from the Mercers' Company to expand their services into areas that were previously unserved and to support communities that are at risk of loneliness. For example several grant holders set targets around reaching more older people from ethnic minorities – a group known to be at particular risk of loneliness and social isolation and who are not always able to access appropriate support to build connections.⁴ Other grant holders targeted support on people with dementia and their carers – again these are groups where the risks of loneliness and social isolation are significant and where tailored support is likely to be needed.⁵

3. Funding is supporting the **creation of and support for volunteering roles**

There is good evidence that volunteering in later life improves our social connections and helps to improve people's wellbeing.⁶ There is also evidence that increased volunteering contributes to community wellbeing.⁷ So, as well as helping to support the delivery of quality services for older adults, the significant number of volunteer roles being created and supported through the Mercers' funding will be benefiting the social connections of the individuals involved (many of whom are likely to be older) and the communities in which they live.

4. Funding is helping more **organisations get better at what they do**

As noted above, many grant holders are using the Mercers' funding to build their capacity – whether by bringing in new members of staff, developing new

²https://whatworkswellbeing.org/wp-content/uploads/2020/01/Full-report-Tackling-loneliness-Oct-2018_0151580300.pdf

³<https://www.independentage.org/sites/default/files/awp/download/2021-06/Lessons%20from%20Befriending%20-%20June%202021.pdf>

⁴<https://www.redcross.org.uk/-/media/documents/about-us/research-publications/health-and-social-care/barrier-to-belonging.pdf?la=en&hash=E2E50B463D7CA8DE736478B831C4704158014041>

⁵https://www.carersuk.org/news-and-campaigns/news/10-facts-about-loneliness-and-caring-in-the-uk-for-loneliness-awareness-week#_ftnref1; <https://onlinelibrary.wiley.com/doi/10.1002/gps.5305>

⁶<https://ageing-better.org.uk/sites/default/files/2020-05/Evidence-Review-Community-Contributions-2016.pdf>

⁷<https://whatworkswellbeing.org/projects/volunteer-wellbeing/>



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partnerships, enhancing their communications activities, or developing new training and support. These are all vital activities which will enhance the capacity of the organisations to deliver in future. In addition several organisations report using the Mercers' funding to develop their capacity to understand their impact – which creates the potential not only to enhance these individual organisations' capacity in future, but also to contribute to the wider national evidence base.

In addition to supporting direct delivery the Mercers' Company has also made a significant contribution to the infrastructure for addressing loneliness – funding the Campaign to End Loneliness to gather and share evidence; the UK Men's Shed's Association to support Men's Sheds around the country; and a small number of other national organisations to deliver infrastructure support to their wider networks (often alongside direct delivery). These organisations play a vital role in building the evidence for interventions, supporting the development of practice and making the case for work on loneliness. These are critical roles, but ones which are not always well supported by other funders.

Improving understanding of impact

What information is available?

From our review of the existing evidence being gathered by grant holders a few broad lessons emerge:

1. Grant holders are consistently able to **report on the activities** they have delivered and generally have a range of **data around the participants** engaging with their offers

Most grant holders reported both on activities delivered and participant numbers. Many offered some break down of participant numbers – e.g. where in the grant holder’s service area people came from; the numbers from target groups (e.g. older people from ethnic minorities etc).

2. Many grant holders administer some form of **survey or questionnaire** among their beneficiaries

Some undertake regular (e.g. six monthly / annual) surveys or before / after surveys; others use surveys in a more ad hoc fashion

However while surveys were commonly used, it was not clear from the data reported how these were administered and what questions were asked. A very small minority of grant holders had worked with an external evaluator to assess their impact, but some of this work had been impacted by the pandemic

3. Many grant holders collect **testimonials, case studies and other feedback** to demonstrate their impact

These testimonials provide a powerful snapshot of the way in which services have impacted individuals’ lives, but because very few grant holders offer any detail about how these are gathered it is not clear how representative these are of the overall experience of participants in the funded activities.

4. There is greater familiarity among grant holders with **wellbeing measures** than with loneliness measures

As noted, no grant holders reported on data from using a formal loneliness measure. However a small number reported data from wellbeing measures such as WEMWBS. One grant holder planned to use data from wellbeing scales as evidence of impact on loneliness – although this was not reported due to challenges gathering data during the pandemic.

Measuring loneliness: an ongoing challenge

Measuring loneliness isn’t easy – as a subjective experience that is different for everyone, we can only know how lonely someone is by asking them. However the significant stigma around loneliness means that broaching the subject is not easy and can feel negative or hard to talk about. It also leads to fears of under-reporting.

As interest in addressing loneliness has risen up the agenda, so has the desire to understand better what works to reduce or alleviate it. An ongoing theme in the literature around loneliness interventions is the lack of robust data around their impact – and in particular the lack of quantitative data measuring loneliness using validated scales.

Closing the gaps in evidence has therefore been an ongoing priority for the Government as part of its implementation of its loneliness strategy.

An early priority for the Government was to improve the consistency of data being collected on loneliness and as part of this work it asked the ONS to assess and select preferred loneliness measures for use across Government surveys. The ONS recommended two measures of loneliness – a three-question version of the UCLA loneliness scale, and a single item loneliness question which asks how often people feel lonely – and these are now used regularly in Government surveys. They are also recommended for use in the context of interventions for loneliness and the What Works Centre for Wellbeing produced guidance on doing so.⁹

However, despite this – as we can see across the portfolio and the wider loneliness field – these measures are not commonly used by organisations working with people who are lonely.

There are a number of reasons for this:

- Many organisations lack capacity to use formal measures, and face particular challenges in using “before and after” measures in the context of more ad hoc events and activities
- Using these measures involves asking people questions about their feelings of loneliness and their sense of having support / companionship which can feel intrusive and personal and which many organisations consider too negative to be used in the context of an intervention which is designed to help people feel better
- Data from these scales requires analysis and interpretation which few organisations have the capacity to undertake

It is also important to note that where organisations do use these measures the results often do not align with wider insights about the impact of the programme gathered through other methods (e.g. case studies and focus groups) – it seems to be very hard to shift levels of loneliness on these scales.

In the recent Impact evaluation of The National Lottery Community Fund’s £82m Ageing Better programme, which explored the impact of the programme on wellbeing, social contact and loneliness, and compared outcomes for people involved in the programme with a comparison group, no overall impact on loneliness was shown. However the programme was shown to have positively impacted wellbeing and levels of social connection. Digging deeper this lack of proof of impact was *despite* the fact that people involved in the programme became less lonely. However because those not involved in the programme *also* saw their levels of loneliness improve over the same period it was impossible to attribute change to involvement in the programme. The evaluators recognised that these findings felt counter-intuitive and argued that the complex nature of loneliness – and the way it is impacted by a wide range of factors which include our access to social support, but also wider aspects of our lives and our communities etc – may mean that we need different measures to truly capture how individual interventions work to address loneliness.

Later in the report we consider why using these measures may not be necessary, or desirable, for the majority of Mercers’ Company grant holders.

⁹See: <https://whatworkswellbeing.org/resources/brief-guide-to-measuring-loneliness/>



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5. Allowing grant holders to define their own outcomes leads to a **high degree of inconsistency** across the outcomes being reported on; and the measures used to assess progress against those outcomes are also highly varied

It is clear that there is no common understanding across grant holders of how to define their outcomes – most grant holders opted for broad statements such as “older people feel less lonely”; but some chose to define a specific change such as “increased engagement among older people from BAME communities” and others stated a deliverable such as “implemented new training”. Arguably some “outcomes” defined were in fact “outputs” and others were “targets”.

Informing the approach

To understand better the potential to improve understanding of the impact of the Mercers’ investment in loneliness as a whole, and of the interventions funded individually, a small number of interviews were undertaken with members of the Mercers’ Older People and Housing Committee and with grant holders supported by this priority area. The aim of these discussions was to understand more about the choices grant holders made in selecting their outcomes and deciding what information to gather to report on these and their capacity and interest in relation to other ways of understanding impact. Discussions with committee members helped to illuminate the key gaps in understanding from the perspective of the Mercers’ Company.

It is important to note that there is a relationship between the nature (size, remit etc) of the organisations funded by the Mercers’ Company and the kinds of impact reporting / evaluation that are possible. In theory it would be possible to impose significantly more rigid reporting requirements on grant holders, or to define a significantly tighter set of outcomes against which progress should be reported, but this would have major implications for the breadth of the portfolio and the kind of organisations that could be funded.

As the Mercers’ Company considers its approach there are some core features of its current approach that would seem important to retain. However their implications for the approach to reporting and for understanding impact need to be recognised. These are:

- **Minimising bureaucratic burden:** The light touch approach taken by the programme to impact reporting, as part of a broader effort to reduce the bureaucratic burden placed on grant holders, is vitally important. Any efforts to develop a clearer picture of the overall impact of the Mercers’ Company’s grant making should not come at the expense of grant holders.

- **Supporting a broad portfolio:** The breadth of the portfolio funded by the Older People & Housing programme – supporting infrastructure development across the loneliness field; capacity building within organisations; and a huge diversity of different kinds of support for older adults across a range of communities and settings and with a wide range of needs – is a real strength. However this means that it is unlikely that data from across this portfolio could be meaningfully aggregated or compared. This is not a unique challenge and even large-scale programmes with substantial (and costly) evaluations have faced challenges in gathering and aggregating data across a wide and diverse programme. For example in their evaluation of The National Lottery Community Fund’s Ageing Better programme, which invested £82m over seven years in substantial local loneliness programmes, the researchers found that structured questionnaires were not suitable for use in all community settings and with all groups of older people and that few tools were able to adequately capture the impact of more ad hoc and one off events and activities.⁹ The only way to ensure that a more consistent set of data could be collected would be to narrow the scope of the portfolio. However this is undesirable. The Mercers’ Company makes a vital contribution to the overall field of loneliness as one of a relatively small number of funders. Maintaining the breadth of the portfolio should therefore be a priority.
- **Supporting medium sized organisations:** The mid-sized organisations the Mercers’ Company supports are at the heart of loneliness response in communities and the Mercers’ Company are one of the few organisations offering responsive funding suitable for their needs. However there are limitations to what data can meaningfully be gathered within such organisations. Charities of this size tend to have some capacity for monitoring and evaluation but usually no specialist or dedicated staff. Even if this barrier could be overcome through provision of additional funding, the numbers of people these organisations tend to support would mean generating meaningful sample sizes would be unlikely. As a result the Mercers’ Company needs to be realistic about the level of data around impact it can expect. Funding mid-size organisations requires a lighter touch approach to understanding impact, but these organisations are the lifeblood of the loneliness response. Therefore ensuring reporting requirements do not exclude these organisations will be vital.

How might we increase understanding?

While allowing grant holders freedom to measure their impact in ways that matter to them is important, it is also important to ensure that any data gathered is useful and used. That is not the case currently. Indeed it became clear, through discussions with both committee members and grant holders, that the information presented in progress reports is not the primary way that committee members understand the difference their money is making, nor do grant holders feel that their work is being “judged” solely on the basis of the reports that they submit. Instead both committee members and grant holders highlighted the very strong and positive relationships built up between the grant holders and the Mercers’ Company staff members leading on this portfolio. Grant holders reflected that they saw their progress reports as a stimulus or supplement to the discussions that they had with their Mercers’ Grant Programme Manager. Committee members reflected that they relied heavily on advice from the grant manager to support them in understanding whether their investments were making a difference.

This raises questions about whether there may be potential to revisit the current reporting structures, to create a more streamlined process which generates more useful information.

⁹See: <https://www.tnlcommunityfund.org.uk/media/documents/ageing-better/Ageing-Better-Impact-evaluation-report.pdf?mtime=20211014143815&focal=none>

In doing this it will be important to bear in mind the following:

- **The Mercers' funding is primarily being used to support tried and tested interventions to address loneliness** – we do not need to reassess their impact on loneliness as there is already evidence around this. As long as organisations deliver these interventions well, then we can be confident about their impact. For this reason measurement of outcomes for individuals who access the support need not be a priority. However it is helpful to understand who interventions are being delivered to. It is also helpful to consider how to test whether interventions are being delivered well. We explore these issues further below.
- **Grant holders value being able to define the outcomes they will achieve** and would be concerned about being asked to an externally selected set of outcomes. Although we only spoke to a handful of grant holders all were clear that the outcomes against which they had elected to assess progress for the Mercers' Company were a reflection or subset of their wider organisational values which were often set in collaboration with their boards / funders / service users. Some would be unwilling, and others would struggle to report against other outcomes.
- **Grant holders prefer to share data that is already being collected across the organisation:** Grant holders told us that the majority of information supplied to the Mercers' Company in progress reports, is data that is being gathered for wider organisational purposes. Grant holders are happy to share this existing data, but could not take on additional data gathering without funding. Similarly there would be challenges in changing these processes for some organisations (as we explore further below). Some grant holders argued that the Mercers' Company should go further and end the requirement to produce bespoke reports altogether, instead drawing on the organisation's overall annual reports / impact reports to understand their impact.
- **The relational and trust-based approach is valued:** In discussions it was clear that both grant holders and committee members felt that the relationships developed between the Mercers' Company Grant Programme Manager and the grant holders were highly valued and a good way of ensuring that the Mercers' Company had a clear understanding of the organisations they were funding. This was a useful insight gathered during the interviews for this project, which did not come through from the review of written evidence - except in so far as grant holders shared relatively candid assessments of the challenges they faced. In discussions the term "trust" was used across the board to describe the relationship between the Mercer's Company and its grant holders with both committee members and staff saying that their approach was to trust their grant holders to be the experts in their own delivery and the best ways to measure its impact and that, once funding was awarded, there was a high degree of trust that they would deliver the things they said, with progress reporting not being considered a "test".

The Mercers' Company should look to build on these strengths as it develops its future approaches.

Simplifying reporting

Given the central importance of minimising burdens on grant holders, we considered whether there might be opportunities to simplify reporting requirements across the portfolio to the benefit of both grant holders and the Mercers' Company's understanding of its work. We identified the following opportunities:

- It may be helpful to give grant holders **clearer guidance around setting out their outcomes / deliverables and measures** – while templates are already provided, it may be helpful to make these even more explicit about the difference between outcomes, outputs, and targets, so that grant holders are clearer about the difference. Creating space to choose whether to report on outputs or outcomes may be helpful.

- Linked to this it may be helpful for the Mercers' Company to be explicit that **re-proving the impact of 'tried and tested' interventions is not required**. For example it may be more appropriate to grant holders to report on delivery rather than outcomes achieved for group activities and one-to-one befriending.
- The Mercers' Company could be **explicit about its interest in understanding how grant holders are using funding to develop their capacity** – e.g. taking on new ways of working / reaching new / under-served groups / developing new partnerships etc.

In addition, it may be helpful to share **guidance around validated measures of impact on loneliness / wellbeing etc** – i.e. to highlight the need for before / after measures and / or qualitative data e.g. from focus groups¹⁰ – and to encourage their use if grant holders choose to measure their impact. Given the above comments regarding the existing evidence around tried and tested interventions, this would only be appropriate and advisable in limited circumstances – for example where grant holders were testing a new approach.

Options for improving understanding

Beyond clarifying reporting requirements, there are a number of other areas in which there may be potential to improve the insight the Mercers' Company has around the impact of grants awarded, without breaching the core principles outlined above. However, in relation to each there are issues and challenges that would need to be worked through in developing the approach.

Participant data

There may be opportunities for the Mercers' Company to gather a more consistent set of data on what interventions are being delivered with its support, and to whom. As noted above, the most consistent aspect of progress reporting across different grant holders was reporting on activities delivered and participants engaged.

The Mercers' Company could give more detailed guidance to grant holders around the data it would be interested in receiving. Potentially useful data could include overall numbers of participants, how many clients were engaged on an ongoing basis (rather than just dropping in); how many new clients joined the organisation; client demographics (e.g. gender, ethnicity, disability status etc).

However, as grant holders pointed out, it would be important to ensure that the approach to data, and particularly data around participant numbers, did not have unintended consequences. Key pitfalls to avoid include:

- Avoiding a “numbers game” in which organisations feel the need to “inflate” numbers leading to a tendency to “pick low hanging fruit” / avoid working with groups that may be harder to engage, or to bolster numbers through one-off events
- Ensuring that approaches to data on break down of participants by ethnicity / gender / age etc, do not create a disincentive to partnership working and appropriate onward referral e.g. to a specialist community organisation where services are offered in an individual's first language
- Avoiding a sense that targets for reach are taken as “pass or fail” indicators / how deviations from intended participation rates might be understood. It would be important to avoid breaking down the trusted relationship in which grant holders feel comfortable sharing challenges
- Drawing on grant holder insight and evidence around what level of “churn” in participation is optimal – for example recognising that befriending relationships are usually long-term so low turnover of clients may be a positive indicator, while

¹⁰ <https://whatworkswellbeing.org/wp-content/uploads/2020/02/Brief-Guide-to-measuring-Loneliness-Feb2019.pdf>



Create

some degree of churn through group-based activity can be a positive sign of welcoming new participants and supporting others to move on

- Offering clarity around how to count participation in organisations where the Mercers' Company is part-funding activities across a range of areas of work

Indicators of quality and improvement

Another approach the Mercers' Company could pursue – in line with the suggestion above around being more explicit about the interest in capacity building and organisational development and to support understanding of the quality of delivery – would be to ask grant holders specifically about a range of areas of practice, which indicate commitment to key aspects of positive practice.

These could include:

- Commitment to coproduction with older adults (from the groups or communities with which the organisation works)
- Mechanisms for feedback and improvement
- Adoption of good practice – e.g. offering a “Warm Welcome”¹¹
- Commitment to partnership and collaboration with other relevant (local / national) organisations
- Undertaking training and development (in line with capacity)

Further work would be needed to develop a more robust framework for these indicators. This should be informed both by external evidence around indicators of quality, and by discussions with grant holders about what would best support their work.

Building insight through relationships

Another approach would be to build upon the strength of the relationships that the Mercers' Company has historically developed with its grant holders – opting to make discussions with and visits to grant holders the primary route for understanding the impact of grants awarded and deprioritising formal reporting.

As noted above, grant holders already reflected that they did not perceive progress reports to be the only way in which their work was understood by the Mercers' Company. Equally committee members said they relied upon insights from grant

¹¹See: <http://www.ageingbetterincamden.org.uk/warm-welcome-approach>

managers to understand if there were problems with any grant holders' delivery, and to assess whether further funding was appropriate. The Mercers' Company could build upon this by creating further opportunities for grant holders and grant managers to meet and discuss progress, and potentially also more opportunities for committee members to hear directly from grant holders – either through meetings or visits.

The main pitfall of this approach is that it lacks a degree of objectivity and rigour – instead it relies on the trust described above. However, mechanisms could be built around these processes to support consistency of approach to capture insights coming out.

This could include, for example, developing a standard set of issues to be discussed, and a consistent programme for visits and discussions, and then creating mechanisms for capturing insights within existing databases.



Create

Focus on capacity building and peer support

In a similar vein, another option would be to build on some of the ways of working the Mercers' Company adopted during the Covid-19 pandemic, and which grant holders and committee members valued. These included regular online meetings in which grant holders shared examples of their work and the issues they were facing and the commissioning of bespoke pieces of research around key areas of interest.¹²

Grant holders had found these opportunities for peer learning valuable and some thought that they could be built upon, offering grant holders more opportunities to come together and learn from one another and potentially from external experts.

There may be potential to offer support and capacity building specifically around impact measurement as a means of helping grant holders to gather more useful information to inform the Mercers' Company's understanding of its impact, and to grant holders make the case for their work. For example, some grant holders said they would value guidance on more robust survey methodologies and questions.

Grant holders emphasised that these approaches should be optional. In relation to surveys while some grant holders understood that their surveys did not “hold water” in evaluative terms, they were also clear that they were useful for internal purposes and would not wish to change them. Others had access to guidance through other networks. As a result any such approach would be unlikely to address inconsistencies in data gathered across the portfolio as a whole. Instead it would need to be understood as part of a capacity-building and support offer, with a focus on developing organisations through the programme as opposed to assessing their impact.

¹²See: <https://www.mercers.co.uk/sites/default/files/2021-05/TMC%20Understanding%20Befriending.pdf>

Conclusions

The funding provided by the Mercers' Company's Older People & Housing programme loneliness priority has supported the delivery of critical support to older adults affected by loneliness and social isolation.

This support, and the flexibility offered by the Mercers' Company during the pandemic particularly, enabled organisations to continue and in some cases ramp up their delivery to groups who were particularly at risk of loneliness and social isolation at a critical time.

The funding enabled delivery of 'tried and tested' interventions including group-based activities for older adults and one-to-one befriending. These are critically important interventions, the impact of which is already understood. The Older People and Housing Committee can be confident that these will have had a positive effect on those reached.

In addition the Mercers' Company funding has enabled grant holders to reach groups of older people who are particularly at risk of loneliness and isolation and who may not be well-supported in the community – including people in geographical areas where there were gaps in support, people from marginalised communities and people who have specialist support requirements (e.g. carers, people with sensory loss and people with dementia and other long-term conditions).

As well as funding direct interventions to increase people's social contact the Mercers' Company funding has also delivered information and advice, enabled people to develop new knowledge and skills and helped people to access other support in their local communities. These are important interventions which as part of an overall response to loneliness and can help people to feel more connected.¹³ It has also supported the recruitment, training and retention of volunteers – contributing to wider individual and community wellbeing and connection. The Company has also supported the development of infrastructure to support the wider loneliness field.

Grant holders are consistently able to give a clear account of their delivery, and to offer some evidence around the difference it makes. However the changes forced by the Covid-19 pandemic mean that there is less read across from the original intentions set out by grant holders for the funding and their ultimate delivery than might have been expected. It also meant that many grant holders were unable to gather impact data in the ways that they had originally envisaged. It may be that the data available to this review would have been 'cleaner' had the pandemic not intervened.

However the high degree of variation in the outcomes chosen by grant holders for their reporting and the lack of consistency in methods of measuring impact would in any event have meant it would not be possible to make an aggregate statement about the overall impact the funding delivered, or to draw any conclusions about the relative benefits of one type of activity over the others.

The Mercers' Company plays an important role in the funding landscape for loneliness interventions for older adults, funding a wide range of activity provided by mid-size charities. This is not an area in which many funders are engaged. The Mercers' Company should therefore ensure that any decisions it makes around its future funding priorities and its approach to monitoring and evaluation are compatible with maintaining the breadth of the portfolio and the offer of funding to charities with limited capacity. It should also prioritise building positive relationships with its grant holders and minimising the bureaucratic burden of its grant processes.

¹³Jopling, K (2020), Promising Approaches Revisited: Effective action on loneliness in later life: https://www.campaigntoendloneliness.org/wp-content/uploads/Promising_Approaches_Revisited_FULL_REPORT.pdf



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However, there may be opportunities for it to provide clearer guidance to its grant holders around defining outcomes for the work for which they seek funding, and around its approach to reporting, to enable it to gather a more consistent set of data to inform its own understanding of its impact. Some key areas to consider include:

- Clarifying guidance around how to express outcomes / outputs / targets in applications and progress reports
- Clarifying its understanding of “tried and tested” interventions for loneliness and where the Company is content to take outcomes for individuals “as read”
- Being explicit about its interest in organisational development and developing simple ways of reporting on these
- Supporting organisations to provide more consistent data around participant numbers, demographics, and engagement etc
- Building on the strong relationships between the grant holders and grant managers to develop new relationships between grant holders and committee members and across grant holding organisations



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