



THE
MERCERS'
COMPANY

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Evaluation of Grants: Church & Communities and Older People & Housing Programmes

Annual Report (2024)

Evaluators

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1.1 ACKNOWLEDGEMENTS

We would like to thank all the projects taking part in this evaluation for their time, willingness and enthusiasm. A full list of funded projects can be found on the [learning space](#) for the Evaluation Learning Team.

A special thank you to the projects who participated in the case studies

- 999 Club
- LEAP
- The Junction
- Dragon Hall Trust
- Norfolk Community Foundation
- Third Age Project

EXECUTIVE SUMMARY

This report presents the first-year findings of a 5-year programme-level evaluation 2024-29 of projects funded by Mercers’ Charitable Foundation, the Charity of Sir Richard Whittington and Earl of Northampton through two funding programmes: Older People & Housing; and Church & Communities.

1.1 PURPOSE

Mercers’ commissioned the evaluation to evaluate the Church & Communities and Older People & Housing programmes in relation to its new Impact Framework. The purpose is threefold: to identify lessons that could be learnt (by charities, the Mercers’ Company, and other funders); present this in the wider context of funding and issues faced by communities and older people within England; and inform Mercers ongoing approach to the programmes.

1.2 METHODOLOGY

Evaluators used a mixed methodology, gathering data through project monitoring information (both applications and progress reports), an online survey of 99 projects, 35 in-depth interviews with project leads and six case study visits. 149 grant-funded projects were included in the evaluation in Y1 (91 Church and Communities, 58 Older People and Housing). A thematic focus on skills and employment was also included within this year’s evaluation.

Alongside the formal evaluation, funded projects were offered related learning activities devised and delivered by the evaluation team: online and in-person meet-ups, and an online resource space.

1.3 FINDINGS

1. Activities, delivery, approaches, and values

Most projects were funded over three years, the average amount granted was £81,000 and the majority of grants were used for core funding. Projects used a range of delivery methods and approaches with Church and Communities projects providing more targeted, one-to-one support than Older People and Housing projects, which provided more group-based activities.

Common across both programme areas were approaches that were value-based. They involved understanding the people being supported and their needs: meeting them ‘where they are at’ and working with them in ways they wanted; building positive relationships through developing trust and building rapport with people; and actively listening to people’s voices to ensure that their situations and needs are fully understood. Other approaches included asset or strength-based, person-centred, and holistic approaches, trauma-informed practices, and peer support.

Key success factors were often about ‘how’ the projects were delivered: providing a welcoming, supportive, informal, and safe environment; consistent, dedicated skilled staff to help build trusting relationships; being responsive, flexible, and inclusive; working collaboratively in partnerships; and the volunteers’ role in project delivery.

The main challenges identified for projects in both programme areas were high demand (more people than anticipated needing support; and beneficiaries needing higher levels of support and having more complex needs), and projects costing more to run. Other challenges were also resource-based: attracting and retaining skilled staff and volunteers, lack of time and resources, reduction in funding available, and experiencing more competition when seeking funding.

Wider structural and systemic issues also posed problems for some projects: the cost of living and housing crises, and changes to government policies and legislation.

2. Outcomes and impact

All projects were (or were on track to be) making a positive difference to people’s lives and many reported that they were already achieving multiple outcomes. Survey results showed the most frequently met project outcomes were: improvements in people’s wellbeing; people feeling more connected with each other; and health gains. A range of other outcomes were more specialised and related to the needs of specific target groups, issues, or communities. Most projects were collecting both quantitative and qualitative data to help demonstrate impact, and user feedback to inform service improvements going forward. Some projects reported finding it difficult to describe and evidence their outcomes.

3. Skills and employment – this year’s thematic focus for the evaluation

Although improving people’s skills and employment opportunities was not a major focus for most projects, many projects in both programme areas did deliver adult learning activities, often centring on personal growth, skills development, and increasing confidence and self-esteem. Most of the learning was either non-vocational or basic skills, or both, and included physical activities, arts and crafts, cookery, and other life skills. This often had a positive impact on people’s health and wellbeing, and longer-term outcomes. A small number of projects did provide vocational learning, often delivered in partnership with training providers, while others signposted beneficiaries to relevant projects to access learning opportunities.

The main challenges faced by beneficiaries in gaining skills and employment opportunities were a lack of self-esteem, low confidence, and mental health difficulties. A lack of required qualifications or poor previous experiences in education were found to be barriers. Projects felt strongly that people learn better through informal activities and that individuals benefit most when given the opportunity to choose what and how they learn.

4. Working with the Mercers’ Company

Projects were very positive about their experience of working with the Mercers’ Company. They found grant managers approachable, knowledgeable, understanding of their needs, and there was an open channel for communication and support when needed. Most project leads said the application and reporting processes were straightforward and less arduous compared to some other funders. The flexibility of the funding, being able to use the funds towards core costs, multi-year funding, and the opportunity to reapply, were seen as extremely positive and contributed to sustainability of the work.

5. Learning from the projects

Evaluators asked projects to consider what they had learned from their delivery of the work. In addition to the approaches described in section 1, the projects described better understanding the demands of the work on staff and volunteers, the importance of recognising and valuing their skills, and the crucial role volunteers played in delivering the projects. They said that project management had to build in flexibility, remain agile, and be open to change; that working in partnership was important to their success; and that being more proactive and less reactive made for more successful delivery. They recognised that quality engagement with beneficiaries required outreach, building in enough time, transport, and using accessible communication tools. Using co-production had helped some to implement ideas from beneficiaries into project design, consultation had helped them to understand their target groups better and guided provision.

Opportunities for Mercers’ to consider

- 1. **Continue to offer multi-year funding** for at least three years to allow projects more time to plan and embed their work and provide more stability.
- 2. **Continue funding core costs**, allowing projects flexibility to respond to the changing needs of the people they are supporting, and actively promote this at the EOI stage.
- 3. **Consider increasing the size of grants** to acknowledge both increased running costs and increased demand for support.
- 4. **Extend the Wellbeing Funding offer** to the Older People and Housing programme projects and showcase the benefits of this more widely across the portfolio.
- 5. **Consider providing evaluation support to funded projects** potentially through common outcomes and indicator sets or training in relevant skills.
- 6. **Encourage increased use of co-production** techniques for projects through involving beneficiaries in project design, delivery, and evaluation.

1. INTRODUCTION AND BACKGROUND TO THE CHURCH & COMMUNITIES AND OLDER PEOPLE & HOUSING PROGRAMMES

1.1 INTRODUCTION

This report presents the findings of the first year of a 5-year programme-level evaluation of **projects**¹ funded by **Mercers’ Charitable Foundation** (MCF), the **Charity of Sir Richard Whittington** (CRW) and **Earl of Northampton** (EoN). This year we evaluated 149 projects. 91 grants were awarded under Mercers’ Church and Communities programme and 58 were awarded by the Older People and Housing programme.

The evaluation was carried out by a team of independent research and evaluation consultants in 2024. This report presents findings from data gathered through **project monitoring information** (held by Mercers’) an **online survey**, **35 in-depth interviews** with project leads and **six case study visits** involving staff, volunteers, partners and a small number of the project beneficiaries/participants. The findings section of this report covers the following areas:

- About the projects, overview of the funding
- Project activity, delivery models, approaches and values
- Challenges and successes
- Outcomes and impact
- Skills and employment – deep dive topic Y1
- Working with Mercers’
- Reflections and key learning

1.2 BACKGROUND TO THE CHURCH & COMMUNITIES AND OLDER PEOPLE & HOUSING PROGRAMME

The Mercers’ Company is a livery company, with a history that dates back over 700 years. Each year they aim to distribute £10 million to charitable causes to improve people’s lives, strengthen projects and contribute to societal change. Focussing on relieving disadvantage in London, Lincolnshire, Norfolk and the Northeast of England. Each year they support around 180 individual projects.

The Older People & Housing and Church & Communities programmes are two of the four programme areas Mercers’ currently funds (Young People & Education and Heritage and Arts Programme being the other two).

The Older People & Housing programme area funds projects or projects that are either;

- (a) **Combatting Loneliness Faced by Older People**, focussing on:
 - Providing opportunities for older adults to foster new connections
 - Providing opportunities to support and maintain existing relationships
 - Working in areas with a high risk of chronic loneliness e.g. areas with high levels of deprivation, a high proportion of minoritised communities, a high percentage of older adults living alone
- (b) **Combatting Poverty Faced by Older People**, focussing on:
 - Tackling the cost of living crisis
 - Addressing a lack of quality housing
 - Providing support in the most disadvantaged areas

¹ This is a rolling grant programme so the numbers vary during each year. The number of projects included in the evaluation are taken from one set time point in the year (April 2024).

The Church & Communities programme area funds projects or projects that are either;

- (a) **Building Stronger Communities**, focussing on:
 - People in the most disadvantaged communities coming together to address what is important to them
 - Community responses to support people who are refugees or homeless
- (b) **Delivering Better Outcomes for Families and Carers**, focussing on
 - Providing in-depth whole-family support to: families facing poverty or other challenges
 - Supporting unpaid carers and their families

2. METHODOLOGY

We used a mixed methodology, allowing us to capture both quantitative and qualitative primary data from **149 active grants**². We also used secondary data held by the Mercers' Company. The different methods are described below, along with the numbers of projects engaging in each element.

2.1 THEMATIC FRAMEWORK

We used a thematic framework to design the survey and interview questions and for the analysis of data. This was informed by the commissioners' requirements and themes and issues that had emerged from a rapid review of relevant evidence ³.

We also undertook a 'deep dive' into **skills and employment as a theme** for this year's evaluation.

2.2 MONITORING DATA

We reviewed the **application data** submitted to Mercers' for all **149** projects. This was split by programme area as follows:

- 91 Church & Communities applications
- 58 Older People & Housing applications

Annual / progress report data was also provided for **120 projects**. The split was:

- 71 Church & Communities reports
- 49 Older People & Housing reports

Where more than one progress report had been received for an individual project, the most recent progress report was included in the analysis. Data included:

- 42 Year 1 monitoring reports
- 61 Year 2 monitoring reports
- 1 Year 3 monitoring report
- 14 final monitoring reports
- 1 signed Grant Agreement

The base numbers vary due to differences in the number of projects who provided information for specific prompts in the reports. Where there was a zero/0 return for a specific question then these have been removed from the analysis.

Tables with relevant information are contained in this report to add background context about the projects including themes, amount being funded and term of grant.

² This is a rolling programme with projects funded at different times during the year.

³ A series of briefings have been produced to support this document. They will be published on our Notion page in the near future.

2.3 ONLINE SURVEY

We designed an online survey with mainly closed questions, allowing us to gather data on: numbers and types of beneficiaries; approaches used; perceptions about the funding; key challenges and successes; and outcomes and impact.

The survey was set up in Smartsurvey and a link was emailed to 149⁴ projects. **Two-thirds (66%, n=99) of projects responded** to the survey (97 full completions and 2 partial completions). The partial completions have been included in this analysis.

Over three in five (61%) survey respondents were from Church and Communities projects and 39% were from Older People and Housing projects. This closely reflects the distribution of the 149 projects funded by the two programme areas included in the evaluation.

2.4 INTERVIEWS

One-to-one in depth interviews were undertaken with Project leads and, in some cases, key staff from **35 projects**. The interviews further explored some of the issues raised in the survey and gathered a deeper understanding of experiences of delivering the projects.

A sample frame was designed using project information provided by Mercers’ to ensure a mix of projects were selected for interview taking into account; programme area, geographical location and funding entity. Projects in their final year of funding were also prioritised. The split by programme area was 66% n=23 were Church and Communities projects and 33% n= 12 were Older People and Housing projects.

Interviews were semi-structured and guided by a script designed by the evaluators and approved by Mercers’ grant managers⁵ before use. The majority, 31 interviews were done via Zoom and 4 were completed face to face. The interviews lasted between 45 minutes and 1.5 hours. All interviews were recorded with participants’ prior consent and transcribed for analysis.

2.5 CASE STUDIES

In addition to the projects selected for interview, case studies of **6 projects** were undertaken in the summer of 2024. Case studies were chosen to represent the 2 programme areas, the 4 geographical locations and the 3 funding entities (see table 1).

Table 1 breakdown of projects selected for case studies

	Programme area		Funding entity		
	Church & Communities	Older People and Housing	Sir Richard Whittington	Earl of Northampton	Mercers’ Charitable Foundation
London	1	2	2	–	1
North East	1	–	1	–	–
Lincolnshire	1	–	1	–	–
Norfolk	–	1	–	1	–

Base: 6

Five of the case studies were conducted in person and one was completed online. The case studies involved conversations with a range of project stakeholders including project leads, key delivery staff, volunteers and beneficiaries, according to what was appropriate and practical for each project.

Three distinct but connected interview scripts were developed for use with the various stakeholders. All asked appropriate questions related to the themes in the project lead script. Interviews varied in length from 30 minutes to 1.5 hours.

2.6 CONSENT/USE OF DATA

Participant information sheets were produced and shared with participants ahead of the interviews and case study visits. These provided an overview of the evaluation, details about what the interview would entail, how the information they provided would be used, and a statement to make clear that participation was voluntary. Verbal consent to record the interviews was gained at the beginning and **written** consent to use quotes and snippets from the recordings (for outputs such as report/film) was obtained at the end or through follow-up email/consent **forms**. To ensure anonymity, and to help give participants confidence to speak openly, we have not used names in this report. Electronic recordings, transcripts and other data have been stored securely and will be deleted 12 months after participation.

2.7 DATA ANALYSIS

Relevant project monitoring information was analysed and selected data is presented to provide context on the projects and key supporting information. The data from the online survey was exported from Smartsurvey and analysed in Excel. Graphs, charts and tables have been created to present key data.

The thematic framework was used to analyse the qualitative data obtained via the depth interviews. The framework allowed us to collate and present findings from the survey and interviews together. Verbatim quotations have been used to highlight key points.

⁴ 147 organisations (2 organisations were funded for 2 separate projects)

⁵ Grant managers include Grant Programme Managers and Grants Officers

2.8 LIMITATIONS

As with all research and evaluation, there some are limitations to this evaluation.

The following three points relate to difficulties in comparing data across the programmes and between projects due to:

- (a) The **different, but overlapping, purposes of the two programmes**. Where there are relevant similarities / differences in data we have illustrated this within the key findings section.
- (b) **The wide range of different activity projects deliver**, ranging from regular-focused support to drop in services. Also, some projects offered broader ‘infrastructure support’ (e.g. development of networks, building organisational capacity) where the ‘beneficiaries’ were sometimes other projects rather than people in communities.
- (c) **Projects were at different stages** of their grant funding – some just getting started, some mid-way and some already ended. Also, **as a rolling programme** the number of projects funded will differ at different time points through the year and through the evaluation as a whole.

The **purpose of the funding varied** with some projects receiving core funding and others funded for a discrete element of their work or a specific staff member or intervention, it was difficult for some project leads to accurately provide numbers for particular questions in the survey.

For the **quantitative data specifically** (i.e. data from Mercers’ applications, monitoring reports and the survey) there were limitations related to inconsistent size of datasets and differences in the data provided by projects. For example, not all projects had provided report data when the analysis was done and questions in the reports and surveys were not always compulsory so the base numbers differed.

Ascertaining the impact of the Mercers funding specifically was not always easy where the grant had contributed to a larger ‘pot’ of funding or towards a proportion of core costs. As is common with unrestricted funding, project leads were not always able to attribute confidently the impact of Mercers’ funding specifically. In some cases, they talked about the impact of the project as a whole.

There were **inconsistencies in the way projects describe their outcomes** e.g. some are more about long-term change, some are unclear, and some are short-term outputs/deliverables. This creates challenges when trying to make comparisons or collate outcomes data.

Projects are **using a range of tools and approaches to measure outcomes** meaning a lack of consistency in reporting. Very few projects were using validated outcome measurement tools consistently, although some had tried to or had limited use of tools such as the UCL loneliness scale, WEMEBS. For most projects, there was a heavy reliance on monitoring data and self-reporting, case stories, and anecdotal feedback.

Nonetheless, by using a mixed-method approach and drawing a wide variety of information, we can provide good insight and a rich picture of the difference the funding is making across England.

3. FINDINGS

This section brings together both primary and secondary⁶ data captured from the various strands highlighted within the methodology section above. As mentioned in the limitations section the base figures do vary according to the time-point at which the analysis took place (given the nature of the funding being a rolling programme) and also the number of projects completing questions on the application data / completing reports and taking part in the online survey. However, base figures are displayed on all tables and charts to aid interpretation.

3.1 ABOUT THE PROJECTS & OVERVIEW OF FUNDING AWARDED

3.1.1 Key grantee data by programme area

Overall, **149 grant-funded projects** have been included in the evaluation for Y1 / 2024. Church and Communities programme funded **91 projects** (61%) and Older People and Housing funded **58 projects** (39%) across 4 themes as shown below.

Table 2: Number of projects by programme area

Programme area	No	%
Church and Communities – Better Outcomes for Families	27	18%
Church and Communities – Stronger Communities	64	43%
Older People and Housing – Combatting Loneliness in Older People	57	38%
Older People and Housing – Combatting Poverty in Older People	1	1%
Total	149	

Base: 149 – Mercers’ ‘application’ monitoring data

The average amount of funding awarded for the duration of the projects was just under £81,000 (most-were funded for 3 years). On average, projects funded by the Older People and Housing programme were awarded slightly more than those funded under the Church and Communities programme.

Table 3: Average amount funded – overall and by programme area

	Average funding amount
Overall	£80,666
Church and Communities	£79,037
Older People and Housing	£83,116

Base: Overall n=149, C&C n= 91, OP&H n=58 – Mercers’ ‘application’ monitoring data

The majority of projects were based in London (70% n=104), followed by 15% (n=23) in the North East and 7% (n=9, n=10 respectively) in Norfolk and Lincolnshire.

⁶ **Primary data** is collected directly from original sources through methods such as surveys, focus groups and interviews. **Secondary data** is knowledge obtained from existing sources such as internal reports and data systems.

Table 4: Number of projects by geographical area – overall and by programme area

R5	Overall		Church and Communities		Older People and Housing	
	No	%	No	%	No	%
London	104	70%	48	53%	56	97%
North East	23	15%	23	25%	-	-
Lincolnshire	11	7%	10	11%	-	-
Norfolk	10	7%	9	10%	2	3%
Other	1	1%	1	1%	-	-
Total	149		91		58	

Base: Overall n=149, C&C n= 91, OP&H n=58 - Mercers’ ‘application’ monitoring data

Most projects (83% n=124) were funded over 36 months and this was similar for both programme areas.

Table 5: Number of projects by term funded – overall and by programme area

	Overall		Church and Communities		Older People and Housing	
	No	%	No	%	No	%
12 months	1	1%	1	1%	-	
24 months	16	11%	12	13%	4	7%
35 months	6	4%	1	1%	5	9%
36 months	124	83%	75	82%	49	84%
46 months	1	1%	1	1%	-	
47 months	1	1%	1	1%	-	
Total	149		91		58	

Base: Overall n=149, C&C n= 91, OP&H n=58 - Mercers’ ‘application’ monitoring data

3.1.2 Wellbeing support

Projects funded under the Church and Communities programme had the option to apply for additional funding up to the value of £5,000 for **Wellbeing support**. This new fund is to help towards the costs of wellbeing support for project leads, staff and volunteers. In total 31% (n=28) of Church and Communities programme grantees had received Wellbeing funding.

Table 6: Number of projects given Wellbeing funding by geographic location. N.B. This is only offered to projects funded by C&C

	Church & Communities	
	No	%
London	15	53%
North East	9	32%
Lincolnshire	3	11%
Norfolk	1	4%
Total	28	

Base: n=28 (Wellbeing funded only) - Mercers’ ‘application’ monitoring data

The Wellbeing funding was used to support staff well-being in various ways, for example:

- Provision of specialist support and supervision for staff
- Staff activities, including relaxation sessions allowing dedicated time to reflect
- Teambuilding days for staff and volunteers

Through the interviews, projects in receipt of this funding expressed how much they valued it and commented on how this offer demonstrated how **progressive the** Mercers’ Company is as a funder.

“The extra £5000 we received towards staff well-being... I think that is really forward thinking”.
Project lead, C&C

“Our staff currently work under strained and difficult conditions, and your support for wellbeing activities has been hugely appreciated”. **Project lead, C&C**

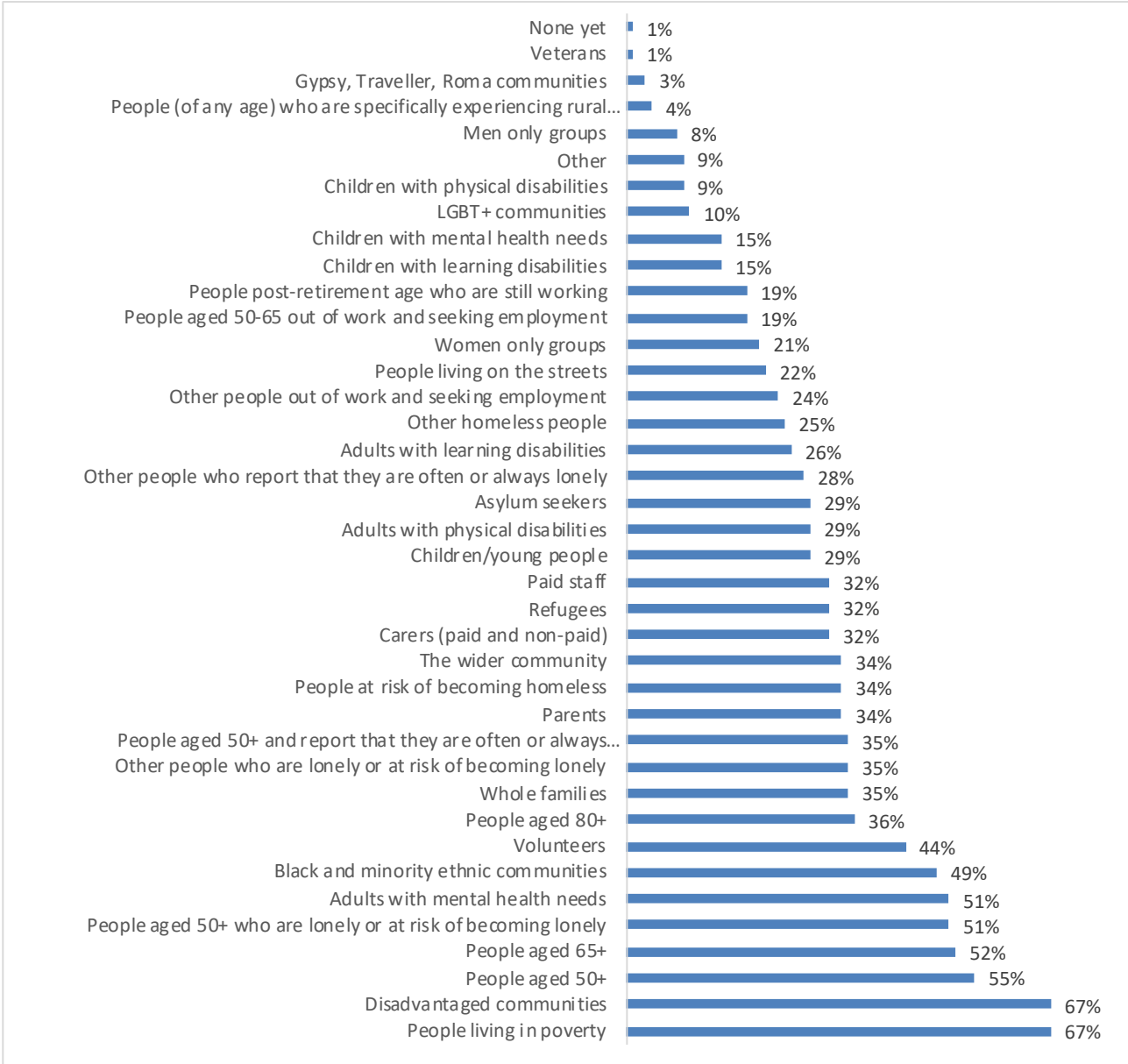
3.1.2 Grant beneficiaries

The survey asked respondents which groups/communities their Mercers’ grant was directly benefitting, allowing projects to select multiple target groups.

Around two-thirds stated the grant was benefitting those living in poverty or disadvantaged communities (67%, n=66). Around half of the projects were supporting people aged 50+ (55%, n=54), 65+ (52%, n=51), those aged 50+ who were lonely or at risk of becoming lonely (51%, n=50) and adults with mental health needs (51%, n=50).

The full list of groups benefitting are shown in the chart below. N.B. These groups were not mutually exclusive, e.g. many of the older people involved in projects funded by the Older People and Housing programme were also living in disadvantaged communities.

Figure 1: Groups/communities directly benefitting from the grants this year



Base: n=99 - online survey '24

Church and Communities projects were more likely to be supporting people living in poverty, disadvantaged communities and families, whilst Older People and Housing projects were mainly supporting people aged 50+ who are at risk of loneliness, people aged 65+ and those aged 80+ (see table 7a and 7b).

Table 7a. Groups/communities who directly benefit from the grants this year – Church & Communities grantees

	Church & Communities	
	No.	%
People living in poverty	48	79%
Disadvantaged communities	47	77%
Whole families	34	56%
Parents	33	54%
People aged 50+	31	51%
People at risk of becoming homeless	31	51%

Base: C&C n=61 - online survey '24

Table 7b. Groups/communities directly benefitting from the grants this year – Older People and housing grantees

	Older People & Housing	
	No.	%
People aged 50+ who are lonely or at risk of becoming lonely	29	76%
People aged 65+	29	76%
People aged 80+	24	63%
People aged 50+	23	61%
People aged 50+ who report that they are often or always lonely	23	61%

Base: OP&H n=38 - online survey '24

Data on the **number of people supported** by the grants (from annual / progress reports) showed on average 658 people have been / will be supported per project during this current year of funding. However, as the table below demonstrates there is a broad range across the projects (between 3-7,400).

Data by programme area highlights that Church and Communities projects supported on average a larger number of people than Older People and Housing projects.

Table 8: Total number of people supported

	Overall No.	Church & Communities	Older People & Housing
Total number of people supported	70,412	43,977	26,435
Average number of people supported	658	709	587
Median ⁷ number of people supported	329	325	255
Range of people supported	3 to 7,400	3 to 7,400	50 to 5,547

Base: Overall n=107, C&C (removing three outliers and 10 zero/nil returns) n= 62, OP&H (removing 2 zero/nil returns) n=45 - Mercers' 'report' monitoring data

⁷ The middle number in an ordered dataset.

3.1.3 Volunteers

Many projects rely on the support of volunteers. Data from the annual /progress reports showed across the two programmes, almost 5,000 volunteers supported around two-thirds (n=96) of projects over the year. Figures were not available on the number of volunteers supported across the remaining projects due to gaps in the monitoring data.

The number of volunteers varies greatly across the different projects – depending on their delivery models (range 1-515). There were also some differences by programme area, with Older People and Housing projects reporting a higher number of volunteers supporting delivery on average (61 volunteers) compared to Church and Communities grantees (44 volunteers on average).

Table 9: Number of volunteers that have been supported

	No	Church & Communities	Older People & Housing
Total number of volunteers who have been supported	4,930	2,429	2,501
Average number of volunteers who have been supported	52	44	61
Median number of volunteers who have been supported	27	27	23
Range of volunteers who have been supported	1 to 515	1 to 286	3 to 515

Base: Overall n=96, C&C n= 55 (removing 15 zero/nil returns), OP&H n=41(removing 7 zero/nil returns) - Mercers’ ‘report’ monitoring data.

Many projects described **volunteers as being central or essential** to their project delivery and especially highlighted the value of those volunteers with lived experience.

“We are deeply rooted in the local community and community volunteers are at the heart of our service.” Project lead, C&C

“60 volunteers come on different days and about 50% are asylum seekers.” Project lead, OP&H

The roles volunteers held varied from more formal task-focused roles (e.g. kinship carer support, offering careers coaching, supporting with digital skills, preparing meals) to more informal, casual support functions (e.g. offering friendship to others). Volunteers in some projects were also involved in delivering and helping with activities, sharing their skills and talents with others. For example:

Age UK Ealing: Used ‘Neighbourly Connectors’ who are volunteers visiting older people at home and accompanying them on shopping, theatre and museum trips, going out for coffee, or staying at home for a chat, some light household tasks and meal preparation.

Several projects stated **how reciprocity was central** to their work and that there was an expectation that all people receiving support also ‘give’ in some small way. This is in line with a **strength or asset-based** approach, identifying valuing and nurturing people’s strengths (knowledge, skills, experiences) rather than focusing on their needs and problems, and working together (‘doing with’) to achieve objectives and goals rather than a top-down approach of being ‘done to’.

“We are increasingly facilitating the volunteers themselves to do things.... we kind of have an expectation that everybody will contribute...And we’re kind of wondering, is there a better term than ‘volunteer’ for that?” Project lead, C&C

“They want to be able to pay back the organization for the support we’ve provided. But we’re also making sure that you know they’re being given an opportunity and support to go through that journey.” Project lead, C&C

Some projects referred to the **limitations of volunteer-led** work and emphasised the need still for paid staff.

“There is only so much that a volunteer organisation can do. If you are going to open your doors and provide services you need paid staff.” Project lead, C&C

3.2 PROJECT ACTIVITIES, DELIVERY METHODS, APPROACHES USED AND KEY VALUES

3.2.1 About the projects/delivery methods and how the funding is used

How the funding is used

The funding provided to projects covered a range of different elements. For a large number this was **core funding**, including staffing costs, which helped projects to expand services and enhance sustainability.

Funded projects provided a range of services and activities for target beneficiaries. Some projects offered multiple strands. In terms of the different delivery models across the two programmes, both worked with individuals and groups although **Church and Communities** projects tended to deliver more of an **individual casework** approach compared to **Older People and Housing** projects which tended to deliver more **group work** activity and befriending.

Activities delivered by projects can be grouped under the following broad themes:

Supporting older people to reduce loneliness and increase social connections. Examples included;

- befriending and home visiting schemes – providing companionship and practical support;
- low-cost or subsidised community-based, age-friendly social and health and wellbeing activities, including initiatives targeting rural and urban areas, experiencing deprivation and poor mental health outcomes;
- providing transport services in rural areas; social clubs/ hubs for older people to meet and socialise;
- up-skilling older people in the use of technology;
- walk and talk groups to develop social connections and improve wellbeing.
- Specific provision for **older people with additional support needs**, included support for visually impaired older people and memory cafes for people with dementia.

Some projects also **supported poverty relief** amongst people who were struggling with a range of issues including increasing fuel and food costs, mental health and isolation. Relevant project activities included: providing advice on benefits, access to grants and budgeting support; providing low-cost food/meals to help reduce both financial and social isolation.

Homelessness and housing support: providing emergency and long-term housing support for people and families who are homeless or at risk of homelessness, including specific provisions for women and veterans. Advocacy and crisis support for rough sleepers and renters at risk, focused on shelter and stability; provision of 24/7 year-round emergency accommodation; providing practical support to single homeless adults.

Women-only provision: Therapeutic 1:1 support and group activities for women who’ve experienced homelessness and severe and multiple disadvantages to help women break the cycle.

Support for Families & Carers. Whole-family support addressing challenges of poverty, mental health, and crisis management; parenting advice; support programmes for parents of children with disabilities; bridging family support to reduce risks of family breakdown; targeted support for prisoners’ families; money advice and support to families in poverty; peer support community hub for autistic people and their families/carers; play services for pre-school children and their parents/carers to build networks and link into services.

Support for carers was provided by some projects, e.g. those caring for people with dementia; learning-disabled carers who are caring for their parents; young carers and kinship carers.

Youth Engagement: Activities for young people from disadvantaged backgrounds, aimed at boosting community involvement and well-being; intergenerational programs to build connections and reduce isolation.

Support for refugees, recent migrants and those seeking asylum: online and telephone information, advice and guidance on legal and welfare rights and advocacy; support with housing /accommodation for families with no recourse to public funds; support with health and mental wellbeing; improve digital literacy and skills development. Also support for vulnerable refugees to overcome barriers, to integrate and participate within their communities.

Whilst the majority of projects used funding to support the delivery of direct work with target communities and beneficiaries – there were some **examples where projects were funded to provide infrastructure support or capacity building** for VSE projects. Examples of these include:

Winner Preston Road administer a grant fund which helps women's sector projects to upskill themselves to develop housing for vulnerable women.

Rare dementia support network developed a diversity and inclusion action plan to support people with atypical & inherited dementias from under-represented communities across the UK.

Imagine Norfolk. Provides churches with the professional skills and knowledge to engage and empower local people to provide support and services to improve the lives of local people. Aims to be a catalyst providing knowledge, experience and encouragement to bring about cohesion and direction in the community – empowering local people to own and lead their own projects.

Norfolk community foundation had a role enabling Mercers’ to reach and fund smaller local projects by administering small grants (up to £10K) to local projects.

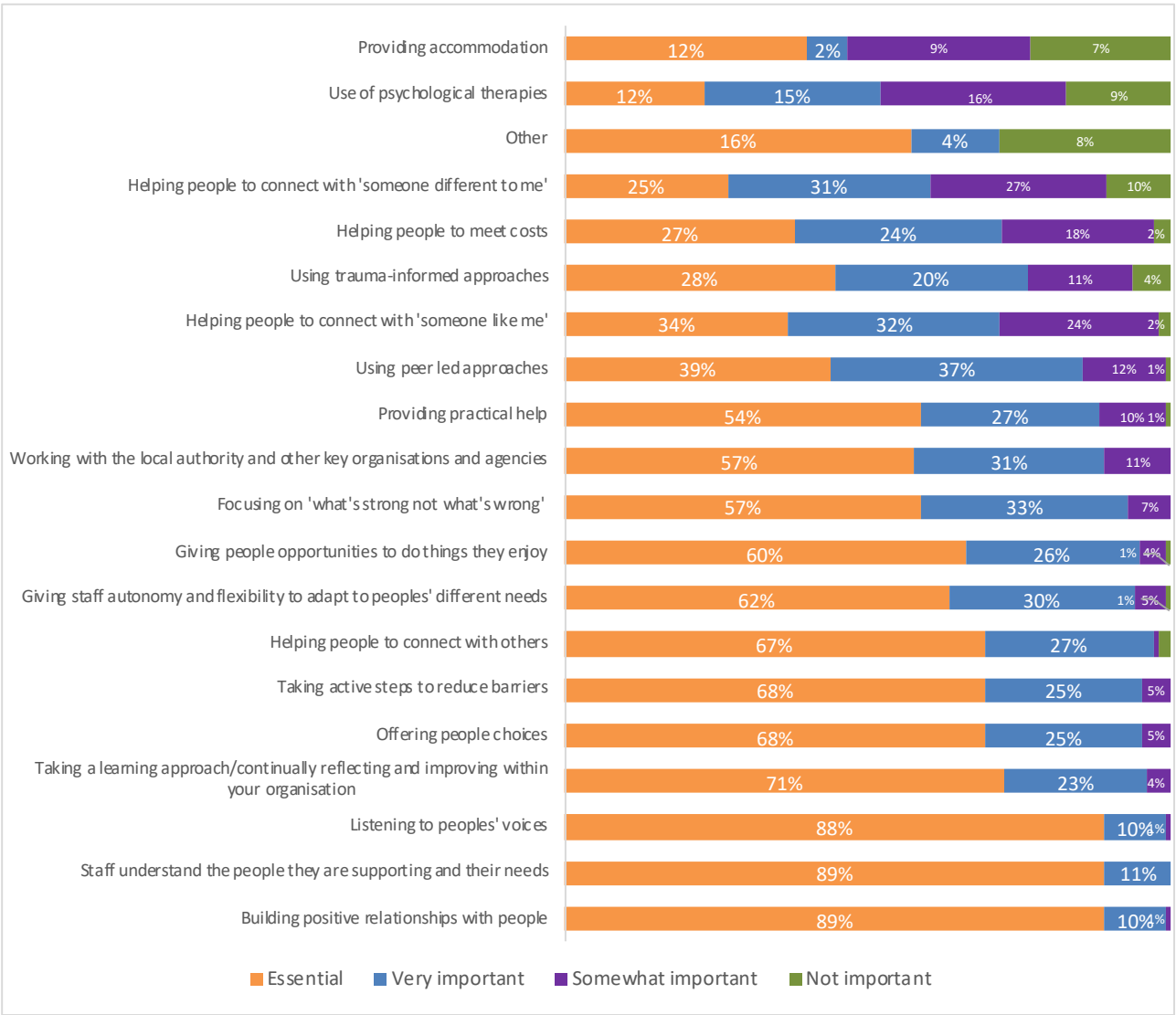
3.2.2 Approaches

Most projects, through the survey stated the following approaches were ‘essential or very important’ in helping them to achieve their outcomes:

- staff understanding the people they are supporting (all identified as essential or very important)
- building positive relationships with people (99% identified as essential or very important)
- listening to peoples’ voices (98% identified as essential or very important).

Other methods and approaches used are shown in figure 2 below.

Figure 2: Important methods and approaches in helping grants to achieve general outcomes (online survey)



Base: n=97 - online survey '24

Further analysis by programme area shows very similar findings.

Table 10: ‘Essential /very important’ approaches in helping to achieve general outcomes, by programme area

	Church & Communities		Older People & Housing	
	No.	%	No	%
Staff understand the people they are supporting and their needs	60	98%	37	97%
Building positive relationships with people	59	97%	37	97%
Listening to people’s voices	59	97%	36	95%

Base: C&C n=61 Respondents, OP&H n=38 - online survey '24

Building trust and developing relationships with beneficiaries was seen as being paramount by all project leads, staff and volunteers. **Trust and respect**, being non-judgmental and showing respect for all was seen as important in this.

“A relational approach (rather than transactional) the person is heard and known”
Project lead, OP&H

The majority of projects (94%) saw the importance of ‘helping people to **connect with others**’ and several highlighted the importance of using **peer support or peer-led approaches** (76% felt these were essential or very important) and involving people with lived experience.

“Involvement of people with lived experience in the actual kind of initial design, not just the delivery of programs... we wouldn’t want to be doing it in a kind of a tokenistic or light-hearted way” Project lead C&C

“We encourage peer-to-peer support...If somebody doesn’t turn up and we haven’t noticed, somebody else will notice”. Project lead, OP&H

Most projects used asset or strength-based approaches (90% saw this as essential or very important), identifying valuing and nurturing people’s strengths (knowledge, skills, experiences) rather than focusing on their needs and problems. For a number of projects, working with people’s strengths was about working alongside them, enabling and empowering and working with them - not delivering to them.

“To value anything people want to contribute about civic and public life; to help channel people’s wish to ‘make thing better’; making a better community; respecting everyone’s contribution to an age-friendly neighbourhood”. Project Lead OP&H

Projects described the importance of being **responsive and flexible**. Many project leads explained how important it was to ‘meet people where they are at’ and to adapt to individuals’ needs, especially for those complex needs or crisis-related challenges. 92% of projects stated that ‘giving staff **autonomy and flexibility** to adapt to peoples’ different needs’ was essential or very important. Being **person-centred and holistic in approach** was mentioned as important i.e. understanding the whole person and their related issues rather than addressing single, stand-alone problems. This way of working also contributed to building relationships and trust – enabled some projects to provide a single point of contact.

“A holistic approach focused on root causes of poverty, especially in crisis provision.”
Project lead, OP&H

Partnership working with other key projects and agencies was also highlighted as being essential or very important by the majority (88%) of projects. Connecting with other specialist providers has helped some projects expand the range of activities offered and more options for signposting people to other sources of support. For some projects, partnering with projects offering free venues and expertise has helped sustain the reach and impact of the work.

“I don’t think anyone can address those complex issues, in isolation. I think they have to work together in partnership”. Project lead C&C

“we work across a number of kind of key statutory and voluntary sector agencies....The most important thing is that the client is receiving the support from the right agency at the right time”. Project lead, C&C

Around half the projects, especially those working with vulnerable women and children, people seeking asylum and from migrant communities saw the importance of **trauma-informed approaches**, recognising the impact of historic and current traumatic experiences (48% of projects felt this was essential or very important).

“So definitely listening, understanding where they’re coming from, having a trauma informed approach” Project lead C&C

3.2.3 Key Values

It was clear from the interviews that the work across both programme areas is underpinned by a strong set of **common values**. Some of the identified values are reflected in the approaches above. The other ‘core values’ cutting across all of the projects are social and community values and include;

- **Inclusive, accessible and welcoming:** open to all, ensuring everyone feels valued and supported, regardless of background. Showing **empathy, compassion and being non-judgmental** were core to this.
- **Empowerment and hope:** Enabling people to take control of their own lives, offering hope and encouraging self-confidence. The majority of projects (93% of survey responses) felt ‘offering people choices’ (93%) and ‘giving people opportunities to do things they enjoy ’ (86%) was essential or very important.
- **Equity and Social Justice:** dignity, equal opportunity, addressing structural inequalities, commitment to represent and advocate for marginalised groups. The majority of projects (93% of survey responses) stated that ‘taking active steps to reduce barriers ‘was essential or very important as an approach.

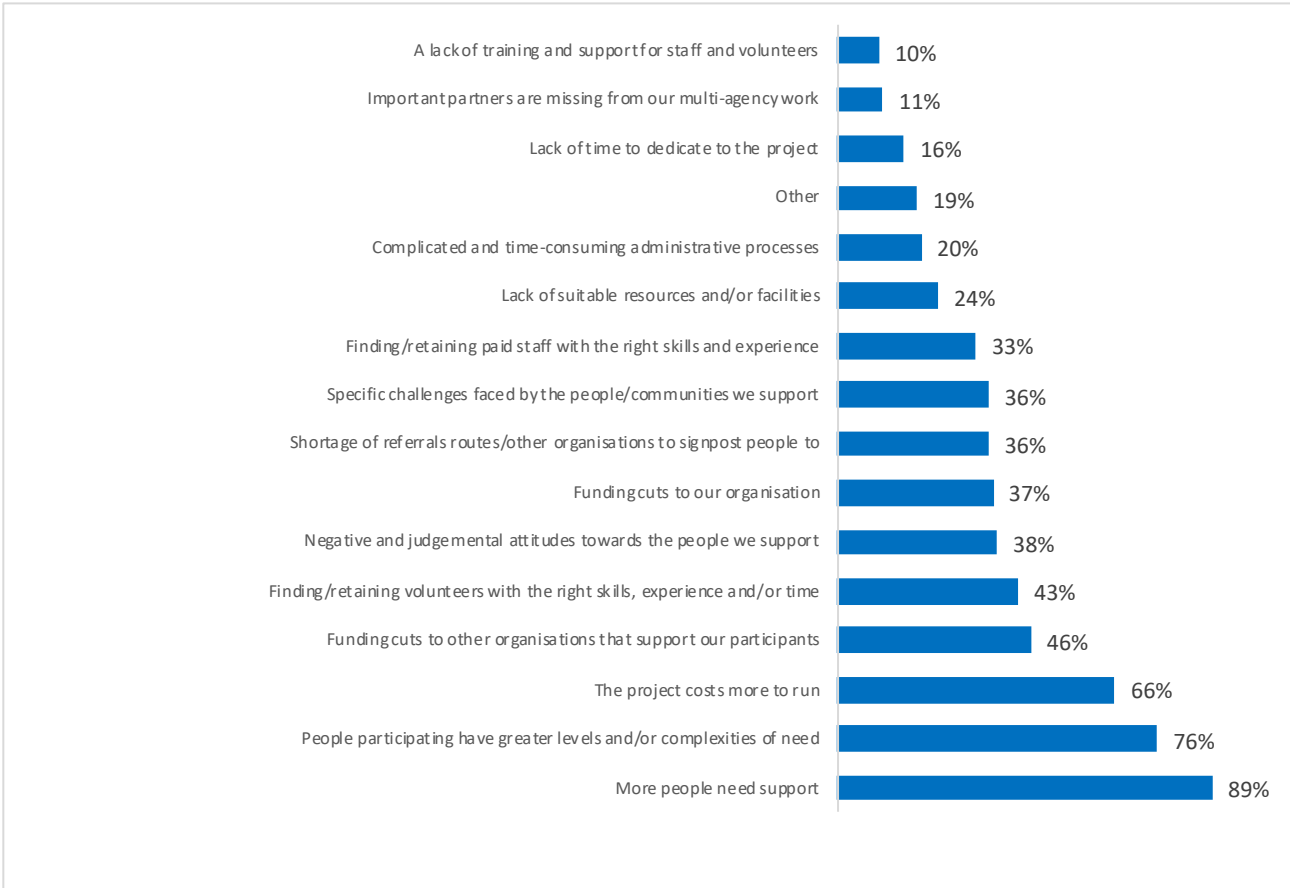
Example: The Lantern project at St Nicolas Cathedral, explained the notion of providing a ‘**radical welcome**’ to all beneficiaries (e.g. people with drug and alcohol issues, homelessness) the idea being that the welcome is as non-judgmental as possible and it is an approach used by all staff and volunteers who come into contact with beneficiaries. This has involved challenging attitudes, amongst staff and volunteers, about individuals who face difficulties and being clear about what a ‘Radical Welcome’ actually means.

3.3 CHALLENGES AND SUCCESSES

3.3.1 Challenges

We asked projects about challenges faced. Table 11 below shows the top 3 challenges identified through the survey – these were the same for projects across both programme areas. However, these challenges seemed to be more pertinent for Church and Communities projects, with a higher proportion of Church and Communities projects identifying these as challenges.

Figure 3: Main challenges your organisation is facing/has faced



Base: n=97 – online survey '24

Table 11: Top 3 challenges by programme area

	Church & Communities		Older People & Housing	
	No.	%	No	%
More people need support	54	89%	32	84%
People participating have greater levels and/or complexities of need	51	84%	23	61%
The project costs more to run	45	74%	19	50%

Base: C&C n=61 Respondents, OP&H n=38 – online survey '24

Similar challenges were raised in the interviews with project leads and staff and it was evident many were experiencing challenges on two levels (a) **wider external challenges** affecting them and (b) **internal challenges** around the delivery of their work and activities which were in some instances specific to their project.

External challenges

The majority of projects who responded to the survey had faced challenges with **more people needing support** (89%, n=86) and those they were supporting had **greater levels / complexity of needs** (76%, n=74). Interviewees said this was further compounded by statutory agencies being less able to cope with demand and often referring people to the projects (in some instances inappropriately).

“We’ve felt the demand challenge. Rather than loads more people coming to the door, it’s been more about the needs have just gone up” **Project lead, C&C**

“Whilst the issues people who are accessing the service are facing are changing and perhaps are becoming more complex for some people, I think the other thing that is having a real impact is the reduction in agencies [capacity] to make a difference for those people”. **Project lead, C&C**

Two-thirds (66%, n=64) of projects claimed their project **cost more to run**. 46% (n=45) said funding cuts to other projects that supported their participants had been a challenge and 37% (n=36) highlighted funding cuts to their organisation.

Access to funding was also mentioned frequently in the interviews. Some projects said they were experiencing more competition when applying for funding and others explained the criteria was becoming stricter for certain pots of money.

“Funding for homelessness and destitution casework is tricky”. **Project lead, C&C**

“Greater competition for funding for services”. **Project lead, OP&H**

Other **structural and systemic issues** such as the cost of living crisis and lack of housing were also mentioned frequently and providing challenges. The recent government changes had added to their concerns. For projects supporting refugees and migrants, changes in immigration legislation and rules and keeping up to date with these was an ongoing challenge.

“We are meeting more people in crisis...without a doubt. I mean more than ever. I’d say our referrals have doubled. It’s people coming with housing, mental health and benefits stuff... Housing is a huge issue, but also just people not being able to afford food – which is a constant challenge” **Project lead, C&C**

“Public services being really at breaking point...I’m thinking, particularly our housing situation – we do way more housing support than we would have ever done. And... we’ve had people in their seventies that are homeless. We’ve actually had people rough sleeping in that age bracket which is shocking!” **Project lead, OP&H**

Nonetheless, some projects said they were adapting to meet some of these challenges by looking at different delivery models.

Internal challenges

Staffing was a challenge, 33% (n=32) had found it hard to find and retain paid staff. This was often due to low contracted hours. Others mentioned challenges related to capacity and resources in terms of **staff time being stretched**.

"We can't get the people we want to who are professional. If you only offer two days a week it is limiting because [the professional people] want a full-time job" **Project lead, C&C**

Just over two in five (43%, n=42) had found it difficult to **find and retain volunteers** with the **right skills and experience**. A slightly higher proportion of projects funded by the Church and Communities programme reported this (44% n=27) compared to projects funded by the Older People and Housing programme (39% n=15).

This was a particular issue when volunteers were facing the same challenges as beneficiaries (e.g. poverty, health issues, caring responsibilities, insecure housing status) which influenced their capacity to give their time or stay connected to the project. Some projects felt they were, 'constantly inducting and training volunteers'.

Not having the time to train and support volunteers was also problematic. Finding younger older volunteers was a challenge for some, as many people are now working into older age.

"People are in difficult situations... we've had to be really flexible as... their situation might change at that moment, so it and then they might not be able to deliver what they were expecting. So that is a sort of constant challenge. And being really flexible in that is important." **Project Lead, C&C**

"Finding long-term volunteers with enough time...it is difficult attracting the younger older people that we used to attract. Now we have a lot of short-term placements, social workers etc... but we can't rely on them in the same way." **Project lead, OP&H**

24% (n=22) said a lack of suitable **resources and/or facilitates** was a challenge. A specific resource issue mentioned by several projects was a lack of physical space which limited capacity. Some projects lacked an informal social space for people to meet in after activities, which they felt would be beneficial for building connections. In another project, a lack of space had led to safeguarding concerns, where groups with high levels of vulnerability could not be separated effectively.

"Welcoming and wanting people with vulnerabilities in a space with other people with other vulnerabilities. How do you manage a space when you have children and homeless people? That's the challenge". **Project lead, C&C**

Although the majority of projects were seeing increased numbers of people needing support, **initial engagement was a challenge** expressed by a small number of project leads. This was particularly an issue for those setting up and delivering a new project, as some underestimated how long it would take to develop relationships and trust with beneficiaries, requiring them to think creatively to encourage participation.

36% (n=35) said that the specific challenges faced by the people supported posed issues.

"Engagement in activities by some participants can be variable due to complex needs." **Project lead, C&C**

Engaging certain target groups/communities (e.g. older men, Bengali community) was also raised as being a challenge within some of the interviews, especially where specific barriers such as language, cultural norms/expectations and transport were faced.

"Tackling barriers of access to support in some Black and minority ethnic communities such as negative cultural beliefs about disability and instead tackle shame to encourage early intervention." **Project lead, C&C**

Several projects also mentioned challenges around **management and/or governance**, with trustees and board members sometimes being too far removed from the delivery of the work to make informed decisions and/or unwilling to take necessary risks.

"Trustees often start from a place of, this is all way too risky, and the organisation is doomed if we do this wild thing, Chief execs come from a much more pragmatic perspective." **Project Lead, C&C**

3.3.2 Successes – strengths/enablers

We asked projects about the key successes of their work. Many of these can be seen to be **strengths and enablers** that contribute to their projects' success. We recognise there is much overlap between key enablers and the values and approaches used by projects (already highlighted above in sections 3.2.2 and 3.2.3).

Key enablers identified were:

Having a **welcoming environment** was seen as hugely beneficial for many projects and helped engagement. Many projects talked about offering a **'safe' space for people**, which was particularly important for those projects working with very vulnerable individuals and seen as a key strength in their offer – sometimes being unique for their geographic location, or cohorts they were supporting.

"We deliver activities to people who wouldn't go to a gym... The funding has enabled us to do what we want to do in the way that we want to do it... [the work helps people move from] isolation to friendship; from being frightened to being included and safe." **Project lead, OP&H**

"We're making a difference in women's lives every day because we're being a safe space. We're being a point of contact that they trust, that they know, that will support them, that they have that relationship with and that that is crucial, because actually, of all the other services that they're trying to access, they don't always get that." **Project lead, C&C**

Providing a supportive, informal, community-focused environment. In delivering community-building activities such as befriending, day trips, social events and lunch clubs projects have strengthened social connections, supported mental health and fostered a sense of belonging – creating informal spaces where participants feel at ease and more open.

"It's like a family, a caring community. It makes a big difference." **Project lead, C&C**

Having **consistent, dedicated, skilled staff** members with **a good local knowledge** of their communities and target groups was a key strength, helping create trust and increase engagement. Project staff interviewed were clearly passionate about their work, with some staff and volunteers having lived experience enabling them to better connect with others in similar situations.

"One of our key strengths as an organisation that impacts all of our projects is the wealth of knowledge and information each staff member brings, we have a number of staff members with a lot of lived experience" **Project lead, C&C**

"Specialist knowledge of housing advisor from her previous professional role means she is very well placed to build relationships with other agencies and build strong referral routes for clients" **Project Lead, OP&H**

Responsive, flexible, inclusive design – Projects respond to the needs of the community, invite and take on feedback, adapting to the changing needs of the people they support. Providing a range of access points (such as home visits, drop-ins and phone support) and a diverse range of activities was seen to increase participation rates by helping people connect and engage in a way that suits them.

“Peer support work... getting carers to look after their own well-being and engage more with us.”
Project lead, C&C

As already discussed at length in **Sections 3.1.3 and 3.2.2.**

Volunteers were essential for many projects, providing much-needed resources, skills and knowledge.

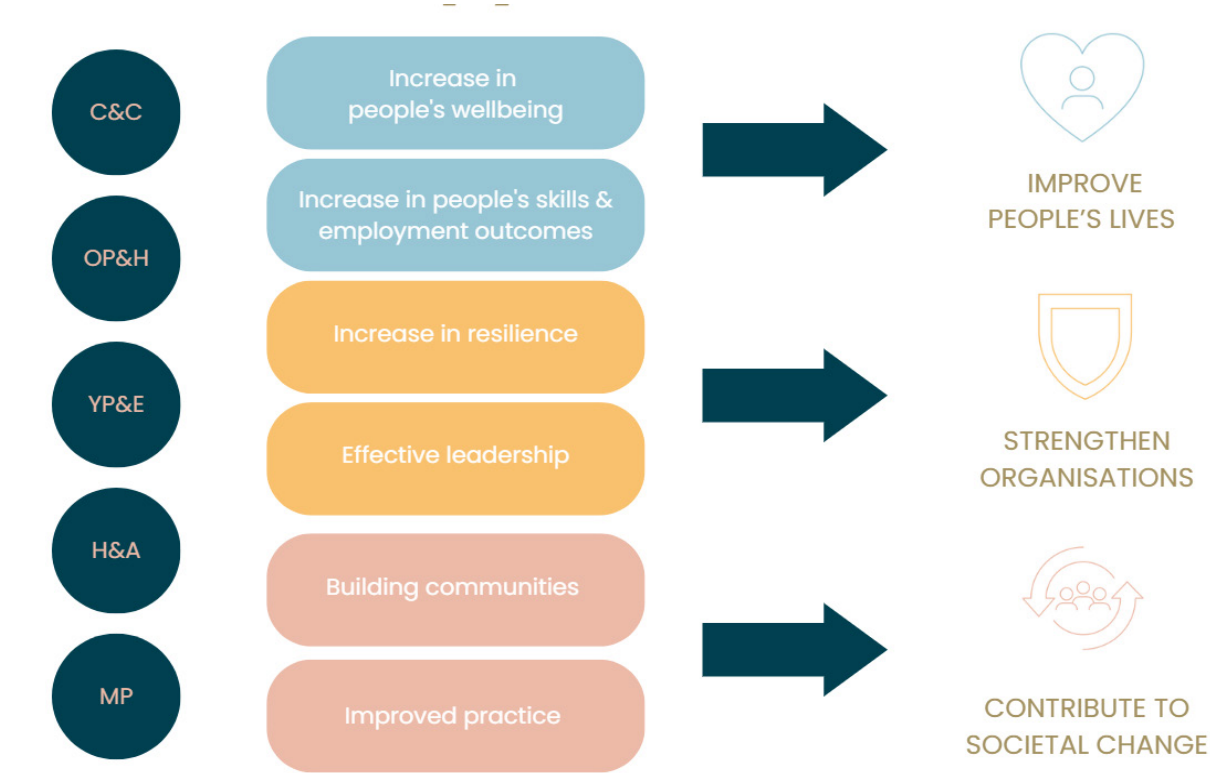
Collaboration and working in partnership with other agencies and developing networks have enabled projects to reach more people and groups and help alleviate some pressures.

3.4 OUTCOMES AND IMPACT

3.4.1 Progress towards outcomes and extent of impact

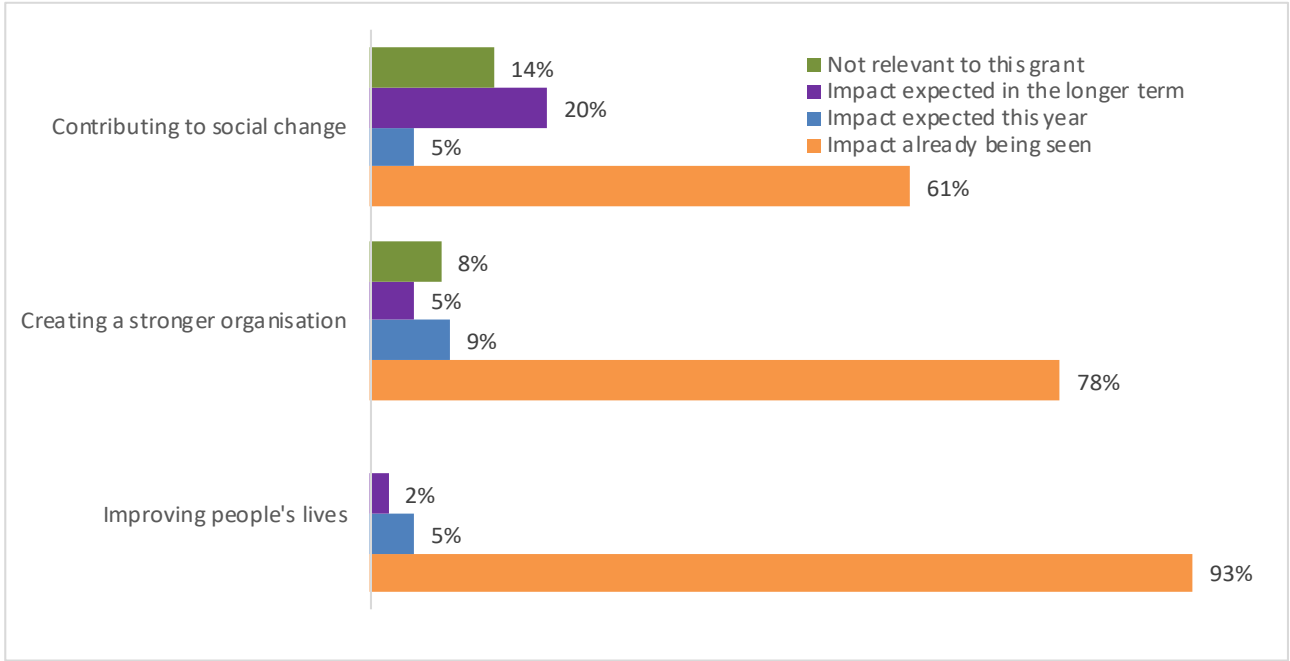
The Mercers’ Company recently developed a new impact framework, to help show the difference grant programmes are making to individual beneficiaries’ well-being, skills and employment, projects’ resilience and leadership, and wider social change that contributes to improved practice and the building of communities.

Figure 4: Mercers’ philanthropy framework



Projects were asked in the survey whether they were already observing any of these impacts due to the support from the Mercers’ Company – the majority said they were. This was **most evident** around **improving people’s lives** (93%, n=92), followed by creating a stronger organisation (78%, n=77). Just over 3 in 5 (61% n=60) said their work had already contributed to social change and a quarter of projects (25%, n=25) expected their work would contribute to this later this year or in the longer term.

Figure 5: The extent to which the support from the Mercers’ Company has / will contribute to the following areas of impact (online survey)



Base: n=99 – online survey '24

Analysis by programme area shows similar findings in terms of the **impact already been seen** across the three measures. Although a slightly larger percentage of Church and Communities projects reported seeing an impact relating to ‘creating a stronger organisation’ than Older People and Housing projects.

Table 12: The extent to which the support from the Mercers’ Company has contributed to the following areas of impact (% reporting impact already been seen), by programme area

	Church & Communities		Older People & Housing	
	No.	%	No.	%
Improving people’s lives	57	93%	35	92%
Creating a stronger organisation	49	80%	28	74%
Contributing to social change	39	64%	21	63%

Base (those who responded ‘impact already been seen’): C&C n=61 OP&H n=38 – online survey '24

Projects were asked in their annual progress reports how their Mercers’ grant had improved people’s lives across three key measures. **All but one project** (99% n=111) stated their grant had **improved people’s wellbeing** and around three quarters (76% n=85) said it had developed people’s skills. Just over a third said their project had helped support people into employment (34% n=38).

As shown in Table 13 a greater proportion of projects funded by the Church and Communities programme were focussing on both developing people’s skills (80% vs 63%) and supporting people into employment (53% vs 4%) than those funded by the Older People and Housing programme (likely to be because of the ages/life stages of their target beneficiaries).

Table 13: How has your grant improved people’s lives?

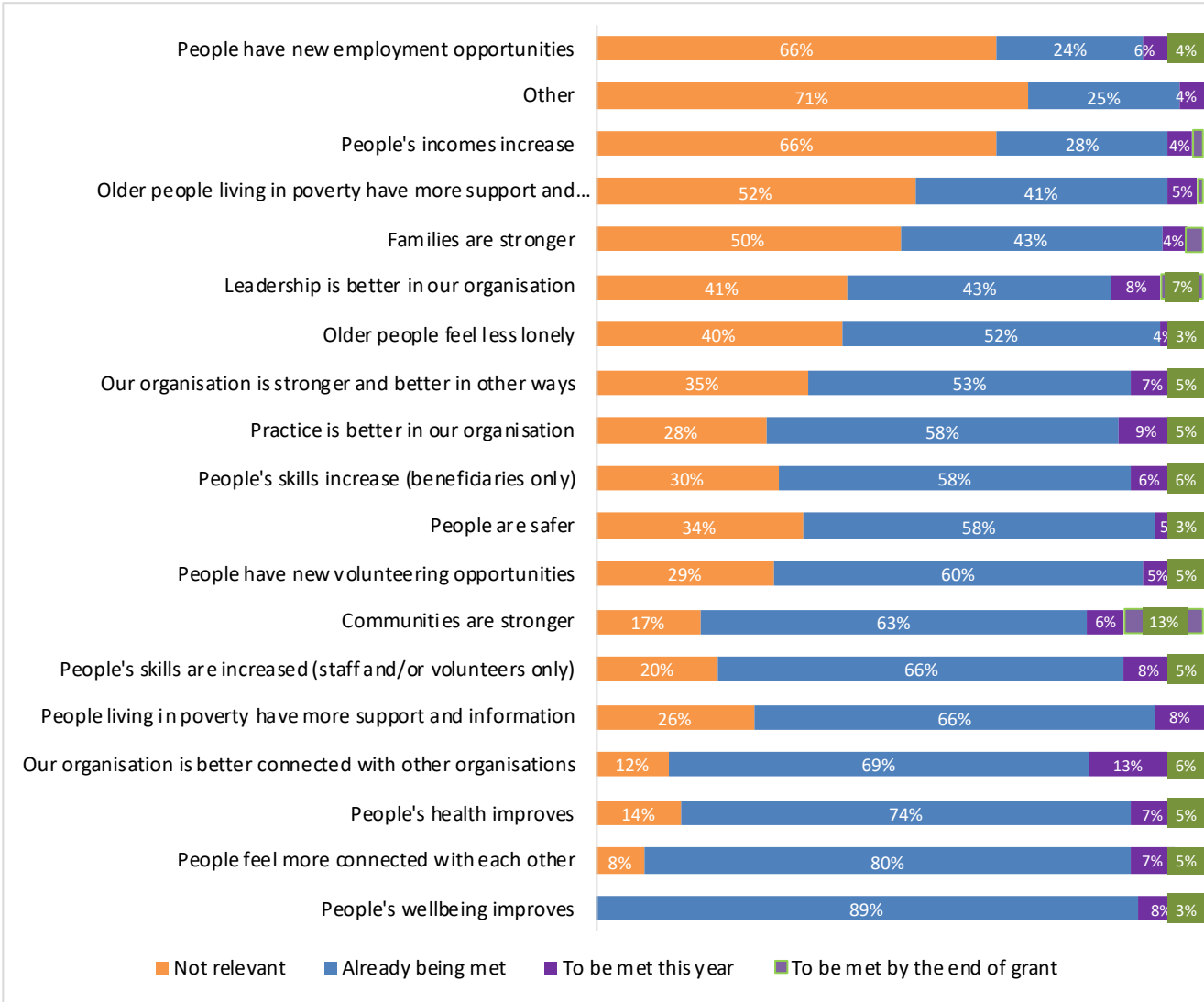
	Overall		Church & Communities		Older People & Housing	
	No.	%	No.	%	No.	%
Improving people’s wellbeing	111	99%	65	98%	46	100%
Developing people’s skills	85	76%	53	80%	29	63%
Supporting people into employment	38	34%	35	53%	2	4%

Base: Overall n=112 C&C n= 66, OP&H n=46 – Mercers’ ‘report’ monitoring data. NB: 8 projects did not answer this question

The survey asked respondents about a range of **general outcomes** being met/or likely to be met, from the support they were receiving from the Mercers’ Company.

Improvements in people’s well-being (89%, n=88), people feeling more connected with each other (80%, n=79) and health improvements (74%, n=73) were the top three outcomes reported to have been met. The majority of projects were not aiming to achieve outcomes around providing new employment opportunities or increasing people’s incomes (both 66%, n=65).

Figure 6: General outcomes the Mercers’ Company does / will support help grants to achieve



Base: n=99 – online survey '24

All projects reported **improved wellbeing** was an outcome that would be achieved by the end of the grant.

Across both programmes, the **majority** of projects indicated that improved health (79% C&C, 84% OP&H), and people feeling more connected with each other (87% C&C, 89% OP&H) has / would be achieved by the end of the year. However, a greater proportion of Church and Communities programme projects than Older People and Housing projects (89% vs 71%) felt the outcome ‘our organisation is better connected with other organisations’, would be achieved by the end of the year.

There were some differences by programmes in the other outcomes that organisations indicated have been / or will be achieved this year, as highlighted in tables 14a and 14b below.

Table 14a: Top 6 general outcomes the Mercers’ Company support has met / will meet this year – Church and Communities projects

	Church & Communities	
	No.	%
People’s wellbeing improved	60	98%
People living in poverty have more support and information	56	92%
Our organisation is better connected with other organisations	54	89%
People feel more connected with each other	53	87%
People’s health improved	48	79%
People’s skills are increased (staff and/or volunteers only)	47	77%

Base: C&C n=61 – online survey '24

Table 14b: Top 6 general outcomes the Mercers’ Company support has met / will meet this year – Older People and Housing projects

	Older People & Housing	
	No.	No.
People’s wellbeing improved	38	100%
Older people feel less lonely	34	89%
People feel more connected with each other	33	89%
People’s health improved	32	84%
Communities are stronger	27	71%
Our organisation is better connected with other organisations	27	71%

Base: OP&H n=38 – online survey '24

In the interviews, many examples were shared regarding the difference the projects were making in people’s lives. The outcomes and impact vary in terms of the focus of the project and how the work is delivered. Below are some examples from each programme to illustrate the difference made. More can be found in the case studies (see **Appendix 6.1**).

Church and Communities programme – example quotes

*"I think it makes a huge difference.... what we are doing is working with a far more vulnerable cohort at the **acute end of homelessness**. 80% have got **no recourse to public funds** when they come in...the flexibility of the funding that we have secured means...we can accommodate people for almost as long as we need to accommodate them." Project lead*

*"We're seeing **women's lives being changed**, and we're seeing women being protected. We're seeing women being helped to know some of their rights, being supported through different systems, whether that's the housing system or helping them around their domestic abuse, linking them into specialist organisations." Project lead*

*"There's been a lot of really good work done with the **children** and it's giving them that platform to speak about their **experiences [of domestic abuse]** and validating their feelings and supporting Mum to validate her feelings. The children are empowered. The support helps to rebalance family dynamics and allow children and their parents to have a better relationship. We would never have been able to do half of that without this funding..." Project lead*

Older People and Housing programme – example quotes

*"The big difference is in **isolation and loneliness**. Being able to come out of the house, being able to make friends... We got people to contact and connect each other." Project lead*

*"We are helping **older people to live well** in later life." Project lead*

*"We're having a massive impact... the key difference is obviously, **the [reduced] isolation....** But also **giving people the confidence**...We've helped people into permanent accommodation, we've helped people with disability badges, access dial a taxi. So that's opening up the whole world to them." Project lead*

3.4.2 How Projects were measuring outcomes and evidencing impact

Projects were asked how they were **measuring outcomes and evidencing impact** and about their experience of doing this.

Data collected by each organisation included **quantitative data** (e.g. number of beneficiaries, number of sessions /outputs) and demographic data on beneficiaries in some cases. **Qualitative data** on beneficiaries experience of the project (process) and the changes for beneficiaries as a result of the work (outcomes) was also collected. Organisations used a variety of different ways to collect data on project outputs and outcomes including:

- In-house databases /systems (e.g. salesforce) to monitor KPIs and outputs. Some organisations are developing new databases to improve project-wide data collection.
- Case management records.
- Feedback forms and surveys issued in person or digitally at various stages (e.g., baseline, post-activity), and used to measure change and capture feedback.
- Pre/Post Assessments: Used to track changes over time e.g. Outcome Star: self-assessment to show beneficiary journeys and impacts.
- Focus groups.
- Case stories of beneficiaries.
- Ad hoc feedback /informal conversations.
- Evaluation forms after events and activities.

Some organisations had explored some **additional evaluation approaches, or commissioned specialist help and support**. Examples included:

- Questionnaires based on participant input (e.g., "What changes for you when you come here?").
- External professionals commissioned to support projects including:
 - Social Researchers – engaged to capture broader demographic insights and feedback for service improvements.
 - Ethnographic researchers who helped design tailored evaluation tools.
 - Economist to write a social impact report, documenting activities and calculating return on investment.

3.4.3 Challenges faced in measuring outcomes and evidencing impact

Some organisations reported challenges with evaluation and outcome measurement, these challenges related to several areas including:

- **Limitations of internal data management systems**, e.g. need for manual workarounds, and the prohibitive cost of tailor-made CRM solutions.
- **Lack of time and resources** to collect qualitative data, stories and feedback when staff time is tight and beneficiaries are facing multiple issues.
- **Lack of staff with skills in evaluation and monitoring**.
- **Obtaining accurate baseline data**. It can take time for people to share and disclose loneliness or vulnerability, which can result in high baseline data influencing the accuracy of progress measurement.
- **Identifying clear, relevant, measurable outcomes**. It can be **hard to know what to measure** when small changes for some can be seen as huge changes for others (e.g. regular attendance).
- **Measuring softer outcomes** such as improved confidence and self-esteem.
- **Choosing and using the right tools**. Pre and post-surveys were sometimes hard to administer and some reported low return rates for feedback forms.
- **Combining quantitative and qualitative data**, finding a balance and condensing data into a summary that meets funders' needs (recognising different funders require different formats).
- **Tracking long-term outcomes** especially when circumstances are complex and evolving (e.g. immigration cases).
- The **time it takes for long-term change to occur** can make it hard to attribute changes to the project activity, complicating case studies and outcome reporting.
- **Ensuring meaningful co-production⁸ and involvement of beneficiaries** in evaluation, especially when working with vulnerable groups.
- **Ethical concerns** around tracking individuals and maintaining privacy.

⁸ **Co-production** is a way of working that involves people who access / use projects or services, carers and communities in equal partnership – this may be in the design, delivery and evaluation of the project / service.

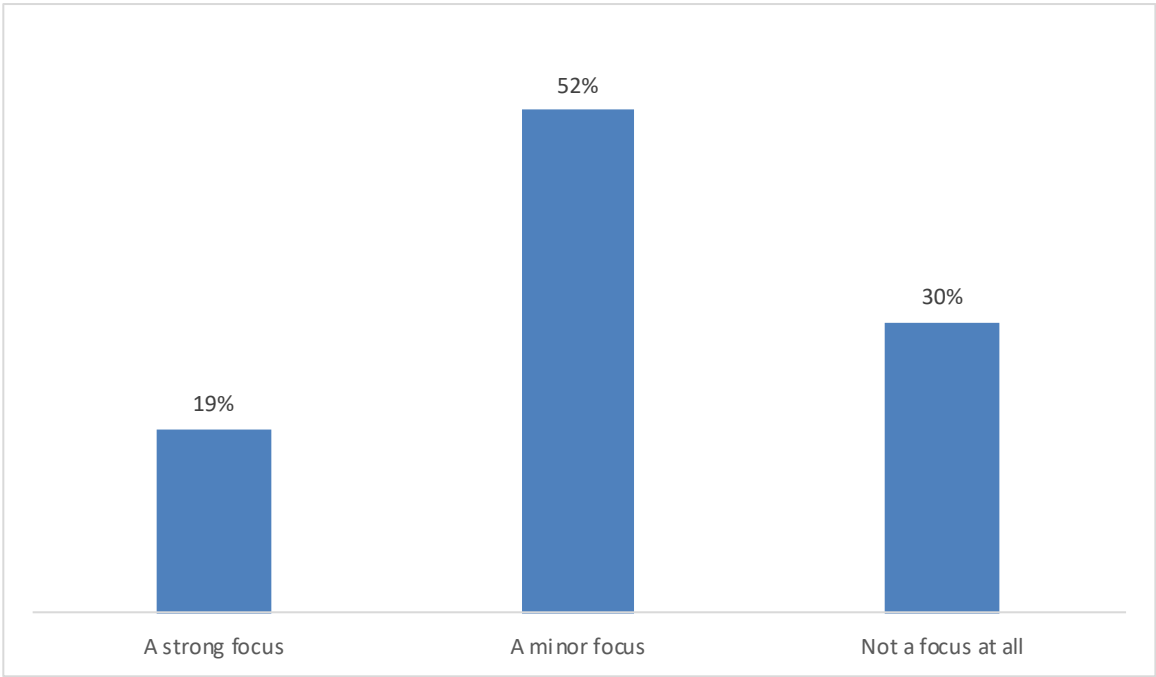
3.5 SKILLS AND EMPLOYMENT ‘DEEP DIVE’

Each year the evaluation will undertake a ‘deep dive’ into one of 4 key areas. For this first year the focus has been on skills and employment.

3.5.1 Extent to which skills and employment were a focus for projects

All survey respondents were asked about their project funded work and/or activities that **supported adult learning, skills and employment**. Around one-fifth of projects (19% (n=18) **had a major focus** on skills and employment. Around half (52%, n=50) had a minor focus and a further 30% (n=29) stated that it was not a focus at all.

Figure 7: How much of a focus on skills and employment does your grant have?



Base: n=97 – online survey '24

Analysis by programme area shows (as we would expect) that Church and Communities projects were more likely to have a strong focus on skills and employment (25% n=15) compared to Older People and Housing projects (8%, n=3). Over half of Older People and Housing projects (51%, n=19) said it was not a focus at all.

Table 15: How much of a focus on skills and employment does your grant have?

	Church & Communities		Older People & Housing	
	No.	%	No.	%
Strong focus	15	25%	3	8%
Minor focus	35	58%	15	41%
Not a focus at all	10	17%	19	51%

Base: C&C n=60 OP&H n=37- online survey '24

Despite the survey findings showing only 18 projects identified that they had a strong focus on skills and employment, the **qualitative data highlighted many projects delivered adult learning-focused activities** (both formally and informally). Projects supported personal growth and skills development, increasing confidence, through providing access to adult learning activities and training.

Why is adult learning important? [from briefing]

Adult learning can be important for individuals to: improve employment opportunities; increase income; build confidence and self-esteem; learn new skills; reduce loneliness; improve well-being; and more. Its importance to individuals varies, depending on their social, economic and personal circumstances **adult learning also benefits communities** and is [shown to have](#) positive impacts on social capital, social cohesion and integration, community involvement, democratic participation and reducing crime and antisocial behaviour.

Only a few projects reported project activity specifically focused on **vocational skills** i.e. ‘skills for jobs’ and gaining employment. However, a number signposted to or worked in partnership with local training providers, enabling beneficiaries to access vocational training when appropriate.

For example, one project stated they worked in partnership with The Shaw Trust, running a surgery on-site every six weeks to assist job seekers:

“They help support people struggling to maintain or get into work and on benefits... they come in and do a surgery every six weeks...So whilst we’re not directly doing that, we’re playing a middleman in ensuring that it happens...we’re not experts in that – they are. And the range of courses that they’re able to offer is far beyond anything we would have been able to do.”
Project lead Church and Communities

Several projects were able to identify how many beneficiaries had gained employment since being engaged with the project. In some cases, employment was secured within the project itself.

“Last year 154 people gained some sort of qualification and nine people went on to gain employment.” Project lead, Church and Communities

“One [woman] has just secured some paid employment with 999 Club.” Project lead, Church and Communities

Much of the training delivered by projects was aimed at volunteers, ensuring they had the relevant skills for their role. Volunteers often had the opportunity to develop softer skills including working as a team, kitchen hygiene, childcare etc. Others received training that has enhanced their employability and paid work opportunities.

“Volunteers receive all kinds of training before working with [clients]” Project lead, Church and Communities

“One of the very unintended consequences of our work...We’ve seen 12% of our volunteers get jobs...we did not intend to do that, that was just part of what has happened.” Project lead, Church and Communities

Most of the adult learning activity delivered by projects was focused on either **non-vocational, basic skills** or both.

Non-vocational learning includes skills and training that are not directly related to work such as physical activities; cookery; budgeting; crafts; confidence-building; self-defence; parenting skills or managing long-term conditions. Non-vocational learning is important, especially for adults from marginalised and excluded groups. They often lead to ‘softer’ outcomes for individuals, which can significantly improve health and wellbeing and/or act as essential ‘stepping stones’ to further learning.

Examples of non-vocational learning provision by projects

Confidence, wellbeing and informal skills development: Learning is one of the 5 ‘[ways to wellbeing](#)’, having a range of benefits, including facilitating social contact, developing purpose, and enabling progression.

Many projects offer **activities focussed on building confidence, social connections and informal skill-sharing**, such as creative activities, which also contributes to wellbeing.

‘Doing art... actually then improves their well-being as it then allows them to then be able to go out and increases their confidence to do other things.’ **Project lead, Older People and Housing**

Other courses provided by projects e.g. Makaton, first aid, independent living, parenting skills, have given beneficiaries important skills and led them to think about their future next steps and consider employment as part of that.

“I think all the courses we’ve done...not only develop those as individuals but also made them more employable... [One mum is] raising her aspirations, thinking about wanting work with children and people with disabilities [following the Makaton course]”. **Project lead, Church and Communities**

“The women have lots of opportunities for developing some of the softer skills that are likely to help them in the future, e.g. increasing confidence/self-esteem.” **Project lead, Church and Communities**

Basic skills are the skills that a person needs to function in society including literacy, numeracy, English for Speakers of Other Languages (ESOL) and digital skills. A person lacking basic skills is likely to find everyday life more difficult and may face challenges with employment, accessing services and information, managing their health, civic participation, parenting and – notably – participating in other learning.

Examples of basic skills provision by projects

ESOL classes were delivered by some projects, primarily to help with language skills but also with other life skills:

“ESOL classes provide English skills but also skills in accessing other services, e.g. GP conversations, using public transport.” **Project lead, Church and Communities**

Other projects offered specific sessions to help ESOL learners with issues such as Universal Credit, incorporating English language skills and digital literacy to navigate online systems and avoid penalties,

“Sessions ...provide a combination of English with embedded digital skills and the topic is understanding your Universal Credit. It’s all online... People say, at least now I don’t feel super scared... logging online and looking at this.” **Project lead, Church and Communities**

Some projects provided onsite support and training to upskill older adults in using digital devices and accessing online provision. Others collaborated with partners, such as Age UK, to provide courses for older adults on the use of technology. Increasing older people’s IT skills has helped them to stay connected with friends and families and helped increase their independence.

“For some of those [older people] if they have the tech available ...what we try to do is an empowerment of kind by showing somebody. Look, this is how I’m doing it... but also kind of looking at where that provision is happening elsewhere in the borough, and seeing how we can bring that in.” **Project lead, Older People and Housing**

“We do have a digital volunteer to come in who was helping people to use phones and everything else.” **Project lead, Older People and Housing**

One project provided accredited training and an intensive scholarship program in bicycle maintenance to a small number of participants.

“We have put cohorts through bike mechanic qualifications...Now we’ve got a more intensive scholarship program for a couple of individuals, and that will include external training.” **Project lead, Church and Communities**

3.5.2 Barriers, marginalisation and exclusion in adult learning

There are a known number of **general barriers to engagement in adult learning** as identified in the briefing (see excerpt below). Inequalities mean that some learners, such as those living in poverty, disabled people, homeless people and young adult carers, will face additional particular barriers, e.g. costs, mobility challenges, lack of physical access, and benefits rules. Many of these groups are supported by the funded projects.

Barriers, marginalisation and exclusion in adult learning [from briefing]

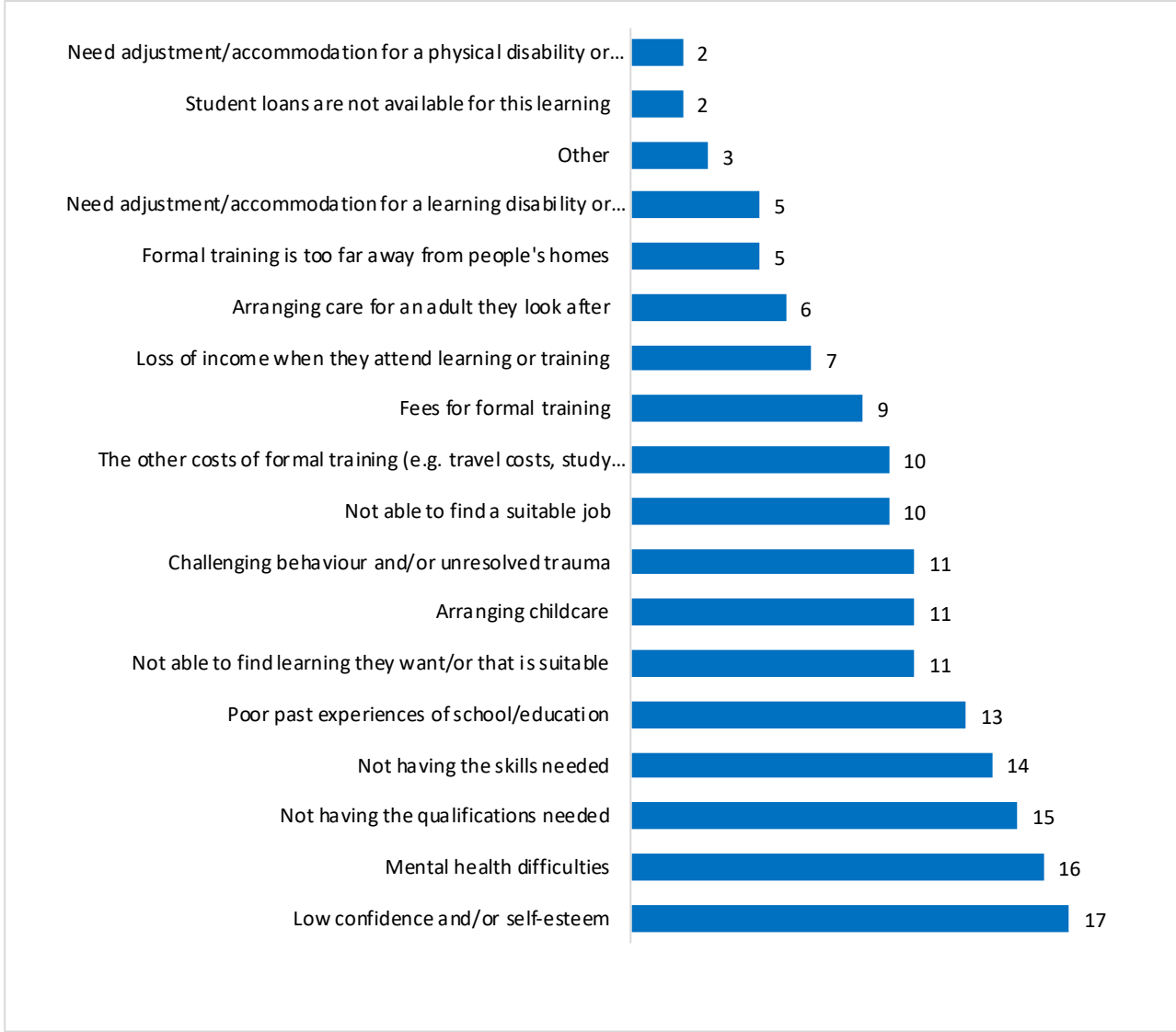
Adults may face many different barriers to accessing learning, because of their individual situation and/or related to past or present experiences of discrimination and marginalisation. Some [known general barriers](#) include:

- lack of time due to work or childcare /other caring responsibilities
- loss of income and additional costs such as travel to learning/training
- not knowing about opportunities, especially for those who are digitally excluded
- negative past experiences of education
- negative attitudes towards education amongst the individual's peer group and/or family
- "lingering impact of trauma [leading to] distrust of educational institutions"
- other barriers e.g. 'too far to travel', 'I don't feel confident enough', 'I feel I am too old'

The 18 projects who had stated in the survey that skills and employment **were a strong focus** of their work were asked some additional questions relating to the **key challenges faced** by beneficiaries in developing new skills and/or seeking employment⁹.

Low confidence and self-esteem were identified as challenges by the majority of these projects (n=17) followed by mental health difficulties (n=16), not having the qualifications (n=16) or skills (n=14) needed and previous poor experiences of education (n=13).

Figure 8: Challenges faced by beneficiaries looking to develop skills / seek employment



Base: n=18 - online survey '24

The subset of survey respondents agreed that beneficiaries faced challenges or barriers that other adult learners did not face (9 strongly agreed and 6 agreed) and that beneficiaries could not afford formal training or learning (7 strongly agreed and 7 agreed).

Projects were also broadly in agreement that they are working with people who do not feel suited to formal learning (5 strongly agreed and 7 agreed), and who mostly do not have formal qualifications (5 strongly agreed and 8 agreed). 12 of the 18 projects agreed that school did not suit a lot of their learners.

In the interviews, projects gave examples of the challenges faced linked to delivering adult learning, skills and or employment-related support. Some projects recognised that **beneficiaries with** complex needs or those facing multiple issues **are not in a position to be in employment** or to access training due to the challenges they face.

9 N.B. Due to the low base number of 18, percentages are not used in this section. The numbers are also too small for further sub analysis by programme area.

*“Most women are **not in a position to start looking for work**. They have lots of other barriers to breakdown first.”* **Project lead Church and Communities**

“There’d be lots of people who just aren’t at that space because they’re not able to work or because of their childcare responsibilities or their mental health or their language.”
Project lead, Church and Communities

Another challenge identified was that some beneficiaries **may be worse off financially** if they gained paid employment (due to a reduction in benefits and assistance with housing costs).

“We’ve got to work through with people... in terms of going into work. Is it going to make you better off or not?” **Project lead, Church and Communities**

On a practical level, a lack of **transport** and unaffordable **childcare** was an issue for some.

A **lack of basic skills**, particularly English language skills, was identified as another barrier to gaining employment for some beneficiaries:

“Language is the biggest barrier to accessing employment. Signposting to English lessons... and use interpreters to discuss needs.” **Project lead, Church and Communities**

In terms of projects offering training and employment support, limited capacity, experience and resources were a challenge for some. This included having skilled staff to deliver training and finding the right providers.

“We don’t have the capacity or the experience to do this...about 5 years ago we had some specific funding for an employment advisor role, who helped people with CVs and interview skills and connecting them with jobs. And I think it would be something really beneficial for us to have, but we’d need a specific project [to fund this].” **Project lead Church and Communities**

3.5.3 Enablers of Adult Learning

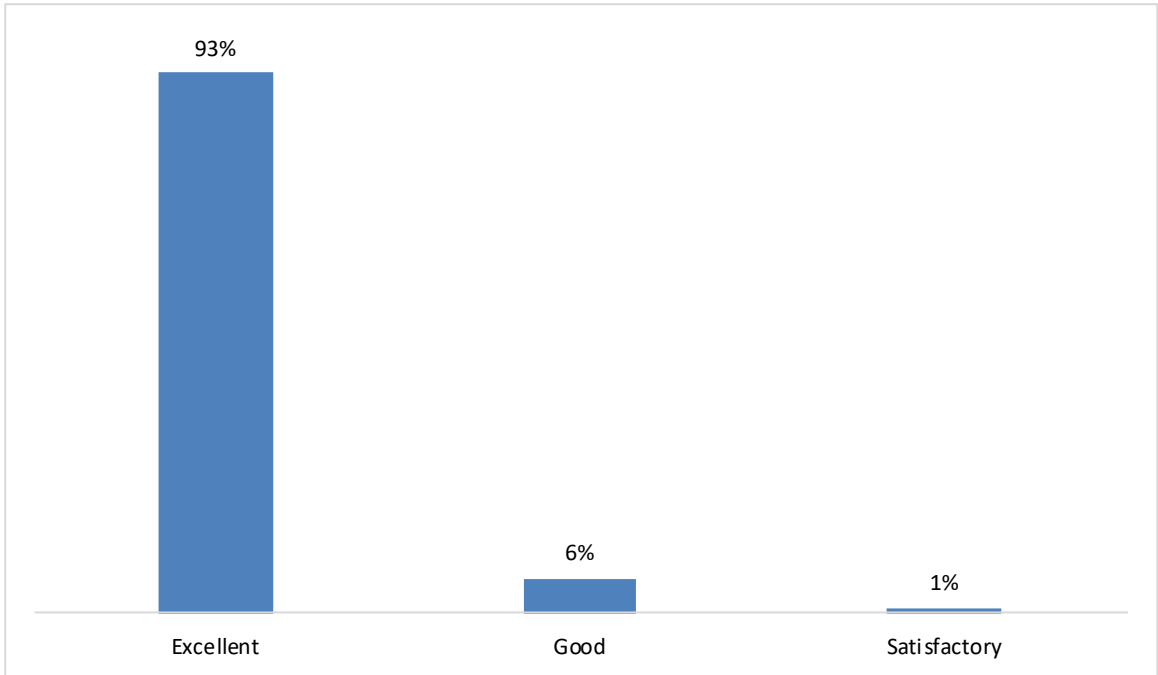
Within the survey, projects were also asked the extent to which they agreed with a range of statements relating to skills and employment. Projects felt strongly that people **learn better through informal activities** that they do not see as learning (11 strongly agreed and 5 agreed) **and that individuals are given the opportunity to choose what and how they learn** with them (8 strongly agreed and 4 disagreed).

3.6 WORKING WITH THE MERCERS' COMPANY AND THE FUTURE

3.6.1 Experience of working with the Mercers' Company

Overall, the experience of working with the Mercers' Company was rated as excellent by survey respondents (93%, n=90). A slightly higher proportion of Church and Communities projects gave an excellent rating (93% n=57), compared to Older People and Housing projects (87% n=33).

Figure 9: Experience of working with Mercers' so far?



Base: n=97 – online survey '24. NB: no responses for 'poor', or 'too early to say/not yet started'

Many interviewees also echoed this finding, praising the **support** they received from their **grant managers**. Several project leads mentioned how approachable and knowledgeable they were and those projects that had been visited (by grant managers and / or Committee Members) had really welcomed this.

“I’d say they, as a funder are incredibly supportive and approachable. I’ve always been able to talk to [named grant manager]. They’ve always been understanding of any challenges that we’ve faced.” **Project lead, Church and Communities**

“It’s been great because I met my grants officer, and this is the only grants officer I’ve met in maybe 8 years and I believe he has a good understanding of what we are doing. And he’s taken the time to come out and see what we are doing and see people that we are working with.” **Project lead, Older People and Housing**

“[They] are very supportive, very engaged, very interested, really. I think even that [named grant manager] came to see the project, you know, that’s, that’s quite unusual these days.” **Project lead, Church and Communities**

When probed about their experiences in writing the application and reporting requirements, most said they were straightforward and less onerous compared to some other funders.

“Pretty straightforward. The guidance is usually very, very clear, but also access to Mercers’ [grants] officers as well.” **Project lead, Older People and Housing**

“It’s not too arduous some funders want so much more.” **Project lead Church and Communities**

However, there were different levels of expertise across the projects in terms of applying for grants. For example, some of the larger projects had a fundraising team with skilled staff responsible for writing funding bids on a regular basis. Whilst in some of the smaller projects this was an ‘add on’ to their role.

“I’ve got a dedicated staff member who kind of is signed up to different places to get information about different funding. So he submitted the bid.” **Project lead, Church and Communities**

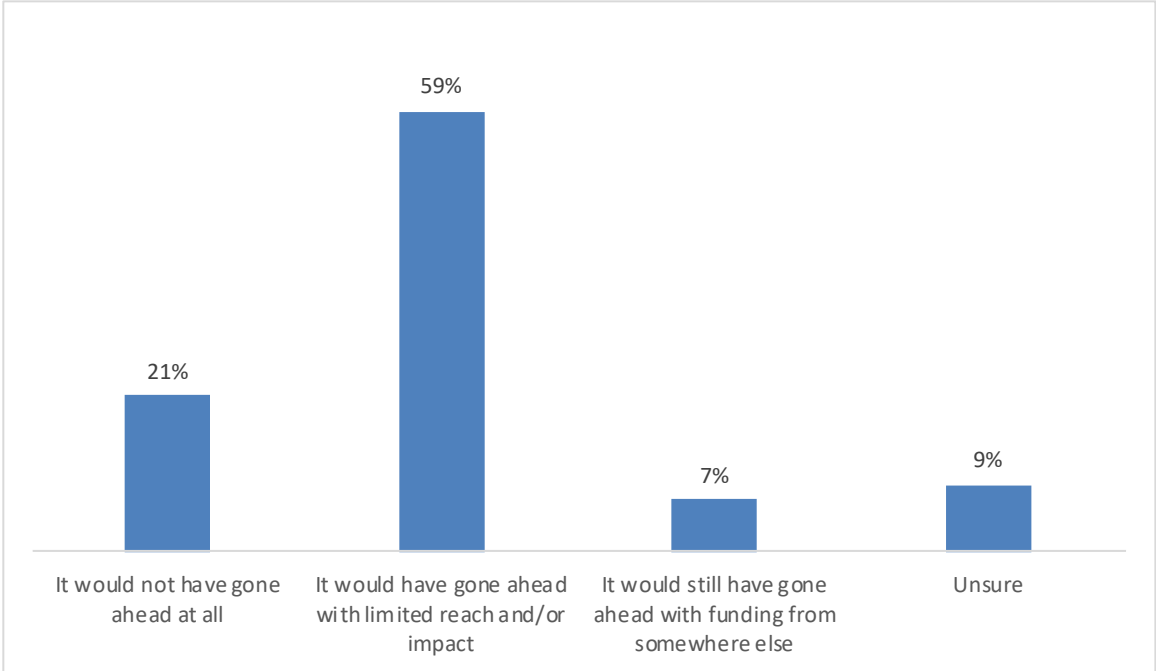
A couple of people also mentioned issues with the online portal functionality.

“Process fine and timeline fine but online portal sub-par: can’t format text e.g. bullet points, can’t go back and see what you’ve submitted, don’t get a copy of the submission, even logging in is a problem (if you are applying to other funders who use the same software).” **Project lead, Older People and Housing**

3.6.2 Benefits of Mercer’s Grant

The grants from the Mercers’ Company had been hugely important to projects, although two-thirds stated their project would have still gone ahead without this. Without the funding, most projects stated it would have had limited reach and/or impact (59%, n=57) and one-fifth (21%, n=20) said their project would not have gone ahead at all.

Figure 10: Without Mercers’ grant, what would have been the likely effect on your project?



Base: n=97 – online survey '24

Responses by programme area show that a larger proportion of Older People and Housing grantees (26% n=10) reported their project wouldn’t have gone ahead compared to Church and Communities grantees (17% n=10).

Table 16: If you had not received a grant from the Mercers’ Company, what would have been the likely effect on your project, by programme area

	Church & Communities		Older People & Housing	
	No.	%	No.	%
It wouldn't have gone ahead at all	10	17%	10	26%
It would have gone ahead with limited reach/impact	39	65%	18	47%
It would have gone ahead with other funding from somewhere else	5	8%	2	5%

Base: Church and Communities n=60 Older People and Housing n=38 – Online survey '24

It was clear through the interviews that grants were seen as beneficial in several ways. Many commented on the **flexibility of the funding**, the **unrestricted** nature and the ability to use the funds in some instances towards **core costs**, which is not always the case for many other funders.

Multi-year funding also helped projects, it allowed them more time to plan and embed their work and make meaningful recruitments. This longer-term funding for core costs allowed some projects to build infrastructure, such as on-site cooking and laundry facilities, helping to increase the quality and variety of their provision. It has also enabled projects to offer more comprehensive, continuous support for beneficiaries.

“A great funder who understands the pressures of frontline work shows genuine interest in our sector...they’re one of the first funders we met that integrated the importance of lived experience within their funding guidelines.... The fact that it’s multi-year, I can’t stress enough the difference that makes and core costs, it’s got a multiplier effect, just in itself.” **Project lead, Church and Communities**

“Multi-year funding like this from Mercers’ is key to our financial sustainability.... We want to be focusing less on fundraising year to year and living hand to mouth and more on looking at how can we get better at what we can do. How can we scale our impact? And it’s the multi-year funding, core funding in particular that enables charities to do that.” **Project lead, Church and Communities**

Securing significant funding from the Mercers’ Company was pivotal for some organisations, changing the way they delivered their work.

“When we got funding from Mercers it was the first grant that made it possible to have paid staff. Before that, we were always working only with volunteers.” **Project lead, Church and Communities**

A number also praised the Mercers’ Company for respecting and valuing the work they currently did and investing in that, rather than asking them to design a project that was innovative and/or new.

“The other thing about lots of funders... they always want you to do something new, innovative. But if we work with elder people to reduce isolation, that’s what we do because that’s what is needed. So to say anything else just feels like you are playing with language”. **Project lead, Older People and Housing**

“If there were more funders, like Mercers, who were very open... and trusted us to do our core work and allowed us to make a decision on how exactly we kind of allocate that money, that’s massive for us as in terms of planning our fundraising and our budget, it allows us to do our

work basically. We don't have to think that we need to do something that our funder thinks is innovative or new or whatever ... this Mercers' money allows us to just, really focus on doing it well. And that's great." **Project lead, Church and Communities**

Several projects stated they had been refunded by the Mercers' Company or were in the process of reapplying. Others said they would apply to the Mercers' Company again once their current funding ends. Having this opportunity was hugely welcomed by projects.

"We were absolutely devastated thinking that it was going to come to an end. But the fact that it's been refunded is obviously amazing" **Project lead, Church and Communities**

3.6.3 Extent to which the Mercers' Company has helped leverage more funding

Over half the of projects (55% n=66) who submitted annual / progress reports said their Mercers' grant had helped them to leverage more funding. A higher proportion of Older People and Housing programme grantees (63%, n=31) compared to Church and Communities programme grantees stated this was the case (50%, n=35).

Table 17: Number and percentage of grantees who have leveraged more funding, by programme area

	No	%
Overall	66	55%
Church and Communities	35	50%
Older People and Housing	31	63%

Base: Overall n=119, C&C n= 70, OP&H n=49 - Mercers' 'report' monitoring data. N.B. 1 C&C project did not answer this question.

Data in the annual / progress reports shows the approximate amount of additional funding leveraged which ranged from £1000 - £1.6 million.

Table 18: Approximate amount of additional funding leveraged

	£
Average amount of additional funding leveraged	£119,082
Median amount of additional funding leveraged	44,922
Minimum amount of additional funding leveraged	£1,000
Maximum amount of additional funding leveraged	£1.6 million

Base: Overall n=64, those that had leveraged more funding

This was explored further through the interviews, with many project leads explaining how the Mercers' Company funding had helped **give other funders confidence** and improve their credibility and reputation.

"We've been able to influence our corporate partners and we've leant on their social values." **Project lead, Church and Communities**

"When they realise you are funded by a large organisation [like Mercers] it gives you a shoe-in." **Project lead, Older People and Housing**

"It's really helpful to have the Mercer's logo on the application form because it adds credibility to the whole setup." **Project lead, Church and Communities**

"It helped leverage money for developing our dementia work." **Project lead, Older People and Housing**

3.7 REFLECTIONS AND KEY LEARNING

Almost all projects (94% of survey respondents) felt it was essential or very important to take a learning approach and to continually reflect and improve. In the interviews, projects were asked about their learning from the delivery of the work, much of the learning related to areas already identified as key approaches and / or successes and enablers. A summary of areas of key learning identified is below:

- **Enablers for engagement with beneficiaries** included; allowing enough time for engagement with beneficiaries; providing transport, especially for those in rural locations or who need assisted travel; using a range of communication tools, in accessible languages; offering outreach providing access and support in multiple locations.
- Recognising and valuing **the qualities and distinct skills of staff** including people with lived experience. The value of having consistent staff that were regularly available was seen as essential for building trusting relationships. *"We realised we were looking for two very different people...somebody with the skills and knowledge to run the advice sessions and another to engage with the community."* **Project lead, Church and Communities**
- **Demands of the work and impact on staff.** Much of the work was emotionally challenging and projects saw the importance of investing in staff well-being to support staff and volunteers. Those that had received wellbeing funding from the Mercers' Company found it extremely beneficial.
- **Importance and contribution of volunteers.** Providing them with appropriate training and support whilst not overburdening them. Reliance on volunteers was seen as a strength and risk factor for some projects.
- **Being more proactive and less reactive.** Many projects had seen an increase in demand and complexity of need which meant they were often working reactively. Some saw the value in taking more proactive approaches and creating more time for reflection on what's working and what's needed. *"The number of people coming through the doors is increasing, and their needs are widening. We want to be less reactive and have time to reset."* **Project lead, Church and Communities**
- **A need to build flexibility** in project delivery accepting that beneficiaries' needs can be unpredictable. Remaining agile to be able to adapt as necessary was seen as valuable learning for some. One project working with refugees had learnt the importance of providing advice alongside the group sessions, to ensure they help in the most meaningful and effective way. *"It's unpredictable work and you have to be adaptable, flexible, and ready."* **Project lead, Church and Communities**
- **Importance of partnerships.** Many projects worked in partnership with other organisations and found that this had numerous benefits e.g. signposting options, helped alleviate the pressures on project delivery allowing focus on their core offer and strengths.
- **Use of co-production and involvement of beneficiaries in project design and delivery.** Some projects were learning about co-production techniques, gathering and implementing ideas from beneficiaries and recognising that effective co-production takes time and resources. Many projects gain regular feedback from participants through feedback forms, focus groups and suggestion boxes which help add to understanding of participants' needs and are used to shape project delivery.
- **The needs of their target groups** through regular interactions with the people they support. This helped guide their provision and future plans. For example, some Older People and Housing projects had learned about the hidden challenges of housing for older people, particularly for older men. *"Men face particular issues with sofa surfing, and there's shame associated with housing problems, especially at an older age."* **Project lead, Older People and Housing**

4. SUMMARY CONCLUSIONS

4.1 ABOUT THE PROJECTS AND AN OVERVIEW OF FUNDING AWARDED

Overall, **149 grant-funded projects** were included in the evaluation in Y1 (2024). **91 were** Church and Communities funded projects and **58 were** Older People and Housing funded projects.

Most projects were funded **over 3 years** and the average amount funded to projects across both programme areas was £81K.

The Mercers’ Company grants were used in different ways, covering different elements of their work. For the majority, the funding was used for **core funding**.

In terms of **beneficiaries**, Church and Communities projects mostly supported individuals and families from disadvantaged communities or with different needs. Older People and Housing projects supported people aged 50+, often at risk of loneliness and living in poverty, with some focusing on older age groups.

4.2 PROJECT ACTIVITIES, DELIVERY, APPROACHES AND VALUES

The projects **used a range of delivery methods and approaches**. Many were delivering specific programmes, services and activities directly to beneficiaries. Other projects were awarded funds for infrastructure support and /or capacity building.

Church and communities projects tended to provide more targeted, one-to-one support than Older People and Housing projects, which were more likely to be providing group-based activities.

Some common approaches were adopted by projects across both programme areas, these were:

- **Understanding the people being supported and their needs.** Meeting them where they are at and working with them in ways they wanted.
- **Building positive relationships through** developing trust and rapport with people.
- **Listening to people’s voices** to ensure that their situations and needs are fully understood.

Other approaches frequently mentioned were: asset or strength-based approaches, person-centred and holistic approaches, trauma-informed practices¹⁰ and peer support were also seen as beneficial.

¹⁰ Approaches that recognise the impact of historic and current traumatic experiences on an individual’s neurological, biological, psychological and social development and using approaches to reduce the impact of these.

4.3. CHALLENGES

Some challenges identified by projects were related to delivery and some were specific to individual projects. The main challenges identified for projects in both programme areas included:

- More people needing support
- People participating have greater levels/complexities of need
- Projects costing more to run

Other key challenges identified were attracting and retaining skilled staff and volunteers, and a lack of time and resources. Reduction in funding available and experiencing more competition when seeking funding.

Wider **structural and systemic issues** also posed problems for some projects, e.g. cost of living, housing crisis’ and changes to government policies and legislation.

4.4 SUCCESS – PROJECT STRENGTHS AND ENABLERS

Key strengths or enablers influencing success for projects identified were:

- Providing a welcoming, supportive, informal and safe environment
- Consistent, dedicated skilled staff to help build trusting relationships
- Being responsive, flexible and inclusive
- Partnership working and collaboration
- Volunteers role in project delivery

4.5. OUTCOMES AND IMPACT

All projects were, or expected to, make a positive difference to people’s lives. Many reported they were already achieving multiple outcomes. Survey results overall showed the most frequent **project outcomes being met** were:

- Improvements in people’s wellbeing
- People feeling more connected with each other
- Health improvements

A range of **other outcomes** were highlighted around meeting the specific needs of particular cohorts/communities being supported.

Most projects were collecting both quantitative and qualitative data to help demonstrate impact, as well as gather feedback to help make improvements going forward. Some projects reported finding it difficult to describe and evidence their outcomes.

4.6. SKILLS AND EMPLOYMENT – ‘DEEP DIVE’

Increasing people’s skills and employment opportunities was not a major focus for most projects, with more Church and Communities projects having a focus on this compared to Older People and Housing projects, mainly due to the age groups/cohorts being supported. However, many projects, across both programme areas delivered **adult learning-focused activities**, often centring on personal growth and skills development and increasing confidence and self-esteem.

Most of the adult learning activity delivered by projects was focused on either **non-vocational or basic skills** or both such as; physical activities, arts and crafts, cookery and other life skills, which in turn often had a positive impact on people's health and wellbeing and longer-term outcomes.

A small number of projects provided opportunities for **vocational learning**, which was often delivered in partnership with training providers. Others signposted beneficiaries to relevant organisations to access learning opportunities.

Key challenges beneficiaries faced in terms of accessing skills and employment opportunities were a lack of self-esteem, low confidence and mental health difficulties. A lack of required qualifications or poor previous experiences in education were cited as barriers.

Projects felt strongly that people **learn better through informal activities** and that **individuals benefit most when given the opportunity to choose what and how they learn**.

4.7. WORKING WITH THE MERCERS' COMPANY AND THE FUTURE

Projects overall **experience of working with Mercers' had been excellent**. Grant managers were described as approachable, knowledgeable and understanding of their grantees' needs and there was an open channel for communication and support when needed. Most project leads said the application and reporting processes were straightforward and less arduous compared to some other funders.

Although two-thirds believed their project would still have gone ahead without the Mercers' Company's grant, most felt it would have had limited reach or been less impactful.

The **flexibility of the funding**, being able to use the funds towards core costs, and the **multi-year funding** were seen as extremely beneficial for projects, contributing to sustainability.

The Mercers' Company grant had helped some projects leverage funding from other sources, with some suggesting it gave other funders confidence and reassurance to invest in them.

Most projects intended to continue their work beyond this current grant. Some projects had already been re-funded by the Mercers' Company and others intended to apply for continuation funding – an opportunity that was welcomed, given the challenges around the current funding landscape.

4.8. REFLECTIONS AND KEY LEARNING

Projects were asked about their learning from the delivery of the work. Much of the learning related to the key approaches/successes highlighted previously. In brief, the learning they shared covered a range of areas including:

- Recognising and valuing the qualities and skills of staff and volunteers
- Reliance on volunteers and need for appropriate training and support
- Demands of the work and impact on staff wellbeing
- Being more proactive and less reactive
- A need to build in flexibility, remain agile and adapt project delivery
- Importance of working in partnership

- Enablers for engagement with beneficiaries e.g. allowing enough time, providing transport, using a range of accessible communication tools, and offering outreach
- Use of co-production to gather and implement ideas from beneficiaries in project design and delivery
- Understanding more about their target groups to help guide provision and plans

4.9 SOME OPPORTUNITIES FOR THE MERCERS' COMPANY TO CONSIDER

- Continue to offer multi-year funding** for at least 3 years to allow projects more time to plan and embed their work and provide more stability through increasing opportunities to recruit and retain skilled staff and volunteers and evidence impact.
- Consider increasing the size of grants awarded** to cover more of the costs to help support projects to continue to deliver their intended activities and better achieve their outcomes. Many reported increased running costs and increased demand in their support and services.
- Continue with funding of core costs**, allowing projects flexibility and the ability to respond to the changing needs of the people they are supporting, enabling them to be more proactive. Actively promote this at the EOI Expression of Interest stage of the application process.
- Roll out the wellbeing funding to the Older People and Housing programme** projects and showcase the benefits of this more widely across the portfolio.
 - Potential to evaluate the effectiveness of the wellbeing fund in more depth during the wellbeing deep dive in year 4.
- Consider providing support to projects with evaluation** e.g. common outcomes and indicator sets, training in relevant skills.
- Encourage / support increased use of co-production** techniques for projects e.g. involving beneficiaries in project design, delivery and evaluation.

1. NEXT STEPS FOR THE EVALUATION & LEARNING TEAM

There has been a lot of learning for the Evaluation Learning Team during this first year, which we will use to help shape subsequent years' methods, approaches and learning focus.

5.1 EVALUATION LEARNING TEAM

In addition to the research and evaluation activity undertaken to date, the Evaluation Learning Team has also created and facilitated opportunities for projects to connect, share and learn from one another.

To date, we have:

- Delivered an initial **online welcome event** for all projects in April 2024. This aim was to introduce projects to the Evaluation Learning Team and explain what the evaluation is likely to entail over the next few years and share ways in which projects can get involved in both the evaluation and learning elements.
- Developed a **Learning Space** which is an informal online platform for projects and a place where they can find out more about the evaluation; the team, how their project may be involved, upcoming events, and updates on our findings.
- Set up **a Slack platform**. This is the interactive part of the Learning Space, where projects can connect, ask questions, share resources and learn from each other.
- Facilitated an **in-person Learning Event** in London on 25th November 2024, bringing together around 50 London-based projects with the aim of sharing the evaluation findings, hearing directly from projects, connecting project staff and sharing learning and ideas. Projects greatly valued the opportunity to network with other projects and share their work. Some of the areas projects wanted more support with included – evaluation and monitoring, accessing funding and co-production.

Next year (Evaluation Year 2 – 2025) we plan to facilitate more opportunities for projects to connect with one another and share learning through:

- Keeping the **Slack channel** and online Learning Space up to date – posting useful information regularly and signposting projects to this.
- **Interacting with projects** through the Slack channel and an email list to encourage them to share information and learn about their work.
- Facilitate **opportunities for projects to connect** and develop partnerships that are mutually beneficial through online platform(s) and events hosted by the Evaluation Learning Team, in partnership with the Mercers' Company. Building on common areas of interest and /or key challenges e.g. co-production, use of volunteers, infrastructure support.

5.1.1 Feedback on the Evaluation Learning Team role

Projects were asked **how the Evaluation Learning team (ELT) could support them** going forward. Most projects saw value in connecting with others doing similar work to share approaches, good practice, challenges and learning. Some suggested peer support between projects could be a valuable option.

A small number of projects said they would value **support with evaluation and monitoring**, helping them to showcase their work and demonstrate their value. Some specific requests for support were; guidance on what to measure and how to measure it; reviewing of project evaluation tools; an opportunity to articulate to other projects the difference between relational and transactional approaches.

Several projects stated they would value support (via mentoring or training) with **other aspects of organisational development** including leadership, management and governance. One project felt this needed to be 1:1 bespoke support, rather than a group session with different projects.

Projects expressed an interest in both online and in person **learning events**, recognising the benefits and limitations of both (e.g time and travel vs quality of interaction and opportunity to build connections). Small local / regional events or online events focused on a particular shared issue or topic were given as suggestions.

Almost 50 project staff have signed up to the ELT Slack channel but the majority have made limited use of the platform so far. Barriers to Slack use included a lack of time, being daunted by the technology and a lack of understanding of what it is / how it could be useful; having another platform to check; lack of compelling content.

Other requests of the ELT were to: share the results of the evaluation and how the Mercers' Company are using the learning from this; to share the briefings; and to provide email updates on evaluation progress.

We will reflect on this feedback and incorporate it into our planning for Year 2.

5.2 EVALUATION AND DATA COLLECTION

We intend to use our learning from this first year to improve our data collection methods and systems, ensuring it is as meaningful and accurate as it can be and provide insight that will help inform the Mercers' Company future grant making decisions. Specifically, we plan to:

- Review and revise the methodology, approaches and key timelines for year 2 of the evaluation. For example, we propose doing fewer online depth interviews with projects and increasing the number of case study visits, allowing for a greater number of staff and beneficiaries to be engaged in the evaluation and a wider range of project activities to be captured.
- Review the data collection tools used in Year 1 (i.e. survey and interview scripts) and refine these to avoid repetition and allow more succinct information to be collected, ensuring we maintain a level of consistency for comparison purposes.
- Take on board feedback from projects involved in the evaluation during Year 1 and adapt methods, processes and approaches where necessary.
- Advise the Mercers' Company on any improvements that could be made to the way project application and report data is recorded. For example, by ensuring data entry fields have a 'forced' response option – even if there is no data to add, through having not applicable / don't know options. This will ensure better consistency in base figures and more accurate data collection.

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