# Campaign to End Loneliness Evaluation: Invitation to Tender

## 1. Introduction

The Campaign to End Loneliness believes that to tackle loneliness we must make it everyone's business and that everyone in later life should have meaningful connections. We catalyse this change through research, education, and powerful communications to inspire thousands of organisations and people to create more effective ways for older people to make and maintain meaningful connections; to reduce the damaging effects of loneliness in older age.

The Campaign to End Loneliness is run by a management group which provides its governance and strategic direction. The management group is made up of individuals with strong experience of the issues addressed by the Campaign and/or the skills the Campaign needs for to succeed.

The work of the Campaign is currently funded by organisations including the Calouste Gulbenkian Foundation, the Tudor Trust, the John Ellerman Foundation, Independent Age and the Big Lottery Fund.

Financial administration and legal accountability for the Campaign is provided by Independent Age (reg. charity number 210729), the 'host organisation'. Independent Age is the employer of the Campaign's staff, and its Trustees have ultimate responsibility for its use of funds, its charitable and legal responsibilities.

## 1.1 Our first five years

Since our launch in 2011, we have created the right conditions for policy makers and practitioners in the voluntary and statutory sectors to help even more of the 10% of older people who feel lonely all or most of the time.

In the last five years, we have raised awareness of the health problems caused by loneliness, shifting the interest and action on the issue by local authorities at a time of budget restraints significantly through our media and campaigning work. We have provided evidence-based advice and consultancy to some of the major new initiatives on loneliness, e.g. The Silver Line, The Co-Operative's initiative with the British Red Cross and the Jo Cox Commission on Loneliness. We have created an international network of researchers to inform charities and service providers about the latest research, a UK-wide network of ambassadors to champion change in their communities and built the beginnings of a movement across the UK to reduce loneliness in older age with over 3000 people and organisations joining our Campaign Network and cause and doing more to tackle loneliness.

For the last five years, the Campaign to End Loneliness has been working with organisations up and down the country, sharing evidence and encouraging best practice. We're extremely proud of what we've achieved:

- Through building a new research network of over a hundred leading academics we have been instrumental in making loneliness a major public health issue
- Our Learning Network has shared best practice with over 900 organisations across all UK nations, transforming service delivery. 95% say they have improved existing services or activities to tackle loneliness in older people as a result of the Campaign
- We have been an influential development partner in Scotland's new National Strategy on Loneliness
- 83% of English local authorities have commissioned new services to tackle loneliness; the majority say they used our resources, information and materials to do so
- 80% of English Health & Wellbeing Boards have made a commitment to tackle loneliness; 73% say this is as a direct result of our influence

At long last, almost everywhere, loneliness is recognised as a major public health issue. Indeed, the Charities Evaluation Service's 2016 evaluation of our work described us as *the national champion of the issue… a catalyst for change*.

## 1.2    Our next four years

Between 2017 and 2020 we will make loneliness everyone's business.

We will inspire people, businesses, community groups and government organisations to act on loneliness in older age by creating action-oriented campaigns, influencing better practice in front-line organisations, getting businesses to offer products and services to customers that help them connect, or support their employees to overcome and prevent loneliness and ensuring that government organisations make loneliness a priority as a public health issue.

With thousands in our campaign network, we will catalyse more effective ways for older people to be and stay connected; leading to a reduction in the damaging effects of loneliness in older age.

The Campaign has been awarded £2.65 million from the Big Lottery Fund to part-fund our work to 2020. The total anticipated spend over four years will be £4m.  During this time our vision is that no one who wants meaningful connections in older age is without them. We aim to achieve that vision by ensuring loneliness becomes everyone's business.

We will deliver our next phase of work nationwide across the UK through public and targeted communications campaigns, growing our campaign network to over 3000 organisations from all four sectors (business, charity, statutory and social enterprise) as well as working intensively in four local campaigns in England, Scotland, Wales and Northern Ireland to create the perfect storm against loneliness in older age.

We would like to commission an expert partner to design and deliver an evaluation of our work over the next four years. The evaluation should include both process and impact evaluation that will enable us to test and learn from our work.  We anticipate that qualitative and quantitative methods will be required.  We want to ensure that across our activities we are getting evidence based feedback on how we are doing and how we could enhance / optimise our efforts. This will require an evaluator to work with us to ensure that the evidence is connected to our strategic plan and informing our decisions as we progress. We need an independent evaluation of our overall processes and impacts that external stakeholders can rely on and which provides learning for the future. We anticipate there would be interim and final summative outputs.

We would like to be able to understand and measure the contribution of our priority projects to real world impacts in a way that is compelling for future funders and partners for the Campaign and would welcome proposals for how this can be achieved.

## 2. Background

The Campaign to End Loneliness will deliver an exciting new national and local programme of work drawing on our work over the past five years. It will drive mass public action on loneliness, mobilise new organisations to act, engage, educate and inform the improvement of loneliness services and catalyse collaboration to co-create effective policies and plans to address loneliness.

Over the course of the funding period, working with local partners, we'll test our new theory of change in four locations: Glasgow; Pembrokeshire and Carmarthenshire in Wales; Cambridgeshire in England and a yet to be determined campaign area in Northern Ireland. Building on our learning from these campaign areas, we'll develop a replicable model to roll out across the whole UK (outside of this funding period and evaluation).
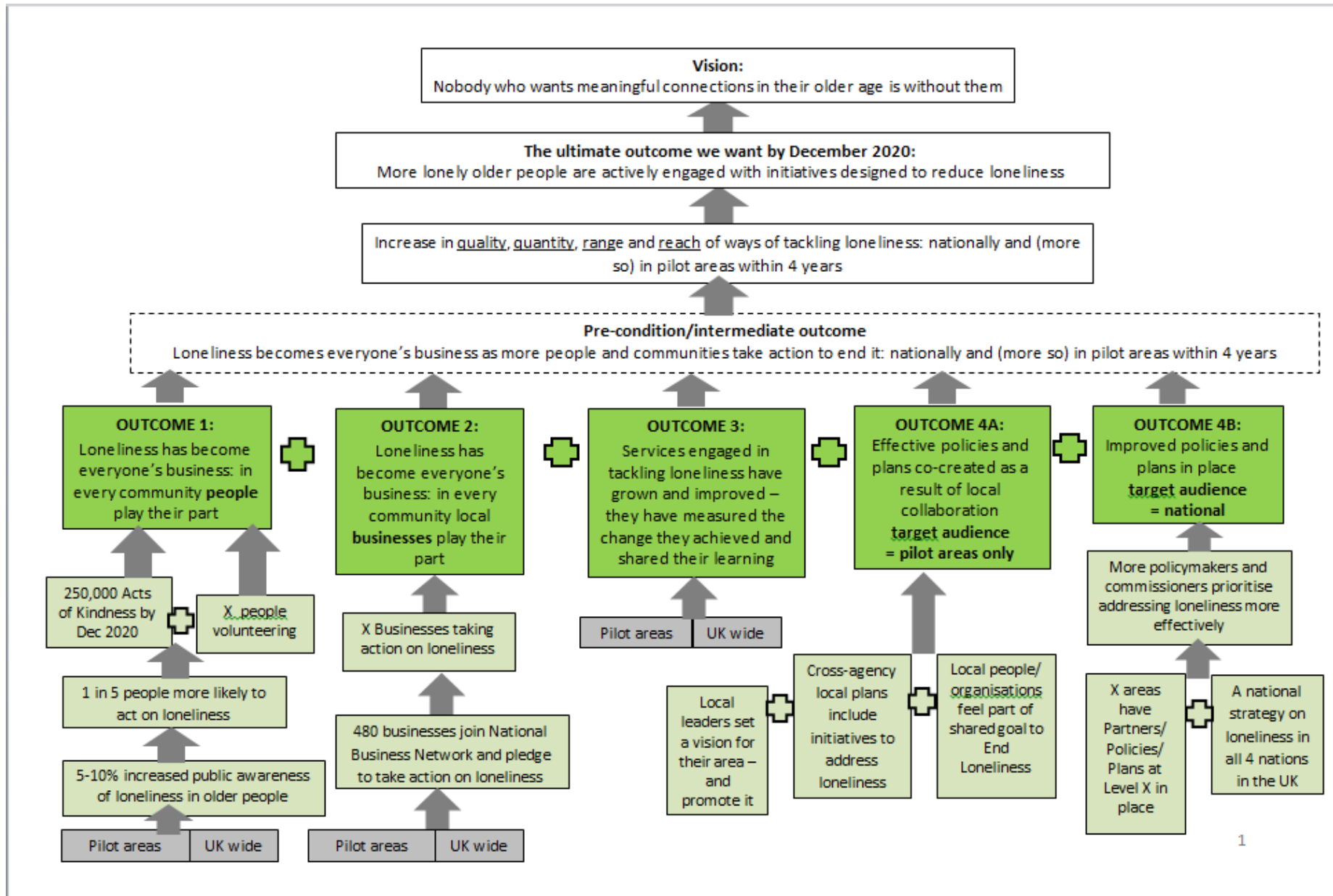
We will be testing and learning in both rural and urban areas, with different levels of deprivation and ethnic diversity, all factors which impact the levels, causes and solutions to loneliness.

### 2.1 Overall aim of the Campaign to End Loneliness

*To prevent and reduce loneliness by ensuring that everyone in later life has meaningful connections by mobilising the kindness of all sections of society.*

### 2.2 The Campaign to End Loneliness Theory of Change

The Campaign has developed a modified theory of change that takes into account our work at a national level and more intensively at a local level via the four campaign areas – see overleaf. Please note the Theory of Change will be periodically reviewed through the period of the evaluation and may well be modified further as we respond to learning. Please note: we want to actively encourage evaluators to assist us to develop and critique the theory of change; once we've established goals and outcomes the development and testing of the 'how' element of our theory of change is critical. Over time the evaluator's feedback data and evidence will help us understand where things are going well and where they aren't.

**Vision:**
Nobody who wants meaningful connections in their older age is without them

**The ultimate outcome we want by December 2020:**
More lonely older people are actively engaged with initiatives designed to reduce loneliness

Increase in <u>quality</u>, <u>quantity</u>, <u>range</u> and <u>reach</u> of ways of tackling loneliness: nationally and (more so) in pilot areas within 4 years

**Pre-condition/intermediate outcome**
Loneliness becomes everyone's business as more people and communities take action to end it: nationally and (more so) in pilot areas within 4 years

**OUTCOME 1:**
Loneliness has become everyone's business: in every community **people** play their part

**OUTCOME 2:**
Loneliness has become everyone's business: in every community local **businesses** play their part

**OUTCOME 3:**
Services engaged in tackling loneliness have grown and improved – they have measured the change they achieved and shared their learning

**OUTCOME 4A:**
Effective policies and plans co-created as a result of local collaboration **target audience = pilot areas only**

**OUTCOME 4B:**
Improved policies and plans in place **target audience = national**

250,000 Acts of Kindness by Dec 2020

X people volunteering

1 in 5 people more likely to act on loneliness

5-10% increased public awareness of loneliness in older people

| Pilot areas | UK wide |
|---|---|

X Businesses taking action on loneliness

480 businesses join National Business Network and pledge to take action on loneliness

| Pilot areas | UK wide |
|---|---|

| Pilot areas | UK wide |
|---|---|

Local leaders set a vision for their area – and promote it

Cross-agency local plans include initiatives to address loneliness

Local people/ organisations feel part of shared goal to End Loneliness

More policymakers and commissioners prioritise addressing loneliness more effectively

X areas have Partners/ Policies/ Plans at Level X in place

A national strategy on loneliness in all 4 nations in the UK

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## 2.3 Key outcomes of work programme

Key outcomes for the work programme from 2017-2020 are:

- o *More lonely older people are actively engaged with initiatives designed to reduce loneliness.*

- o *Loneliness has become everyone's business: in every community people play their part.*

- o *Loneliness has become everyone's business: in every community local businesses play their part.*

- o *Services engaged in tackling loneliness have grown and improved – they have measured the change they achieved and shared their learning.*

- o *Effective policies and plans co-created as a result of local collaboration.*

- o *Improved and new national and local policies and plans on loneliness in place- with targets to reduce levels of loneliness incorporated*

### 2.4    Our overall work programme: phasing

**Key phases of the work programme:** Please note – We would like ongoing formative evaluation as we move through the first 16 months where possible and appropriate and in the following 16 months too.  Please note - see section 4.5 with respect to obtaining more detailed information on the current proposed work plan.

| Date | Phase | Activity | |
|------|-------|----------|---|
| 1$^{st}$ January –1$^{st}$ June 2017 | Set up phase | Staff recruited, evaluation partner and other consultants commissioned. | Ongoing test & learn |
| June - September 2017 | Development phase | Development of campaign materials and activities for Phase 1.<br><br>Undertake evaluation baseline activities | |
| September 20 2017 | Launch | Launch four local campaigns | |
| 1$^{st}$ October 2017 – 31$^{st}$ January 2019 | Phase 1 activity (16 months) | Phase 1 activity – | |
| February 2019 | Mid-term evaluation | Evaluation from Phase 1 analysed and incorporated into Phase 2 activity | |
| 1$^{st}$ March 2019 – 30$^{th}$ June 2020 | Phase 2 activity (16 months) | Phase 2 activity (incorporating learning from Phase 1) | |

## 3  Evaluation specification

We would like to commission an evaluation partner to work with the Campaign from June 2017 to December 2020.

### 3.1 Aims and objectives of the evaluation (note these are open for further refinement)

We require an evaluation that will focus heavily on formative evaluation, in order for us to truly learn from and refine our work as we progress through the course of 2017 – 2020. However, it will also include impact evaluation. We wish to:

- *At points along the next 4 years, and in a summative evaluation, measure the impact of the work of the Campaign on improving the quality, quantity, reach and range of loneliness interventions (defined as anything that is done to reduce loneliness by any person or organisation) for older people*


    The impact evaluation should measure the direct and indirect impacts (with clear limits of what indirect impacts it is possible to measure) of the work programme – including interim outcomes to show progress towards ultimate outcomes.


- *Through use of a process, or formative evaluation enable us to understand how the work of the Campaign is having an impact through evaluating our work programme nationally and in the four campaign areas*

    We want to understand what the key factors for success are nationally and in the different campaign areas

    We also want to understand how to improve our work and to maximise and optimise the positive impacts

## 3.2 Evaluation framework

The evaluation framework that we are seeking an evaluation consultant to create with us should take into account the dual-nature of the evaluation.

Impact /summative evaluation: Our work over the next four years will have a number of key strands of activity to deliver on the key outcomes (above) identified in the theory of change. Within each of these strands of activity there are a number of key questions and assumptions that we must answer through evaluation before we can move forward with confidence with the next phase of our work.

Process/formative evaluation: Following detailed conversations with the team at the Big Lottery Fund and the Centre for Ageing Better in preparing our bid for funding we have identified the major questions and hypotheses we will test through the four campaign areas and how this learning will enable us to test models and frameworks that can be replicated. Please note these questions can be added to, or improved by the evaluation consultant in order to ensure our evaluation is able to show what is working for us and how it is working.

- *What are the most effective means to communicate, engage and drive mass public action on loneliness?*
- *How do we communicate, engage and catalyse new organisations, including businesses which are not already involved in loneliness, to take action?*
- *How can we best engage, educate and inform the improvement (quality, quantity, range and reach) of loneliness services?*
- *What are the best ways to catalyse local collaboration to co-create effective policies and plans, which can be turned into positive action? To what extent can activity be driven by local Advocates (50% older people) working alongside local stakeholders and a local Campaign Manager?*

### 3.3 Key considerations

We set out below some of the key challenges that we have identified for this evaluation –please address these and the questions posed in your proposal. However, this is not an exhaustive list and we would welcome any additional considerations that tenderers wish to bring to our attention in their proposals.

*Budget limitations*

- We will not be expecting to measure a reduction in the prevalence of loneliness among people given our limited budget but we regularly get asked to prove what our impact has been on people's lives. **What approaches exist that could help us to understand our impact? What advice would tenderers offer on this issue?**
- We will have a lot of different work streams and different priorities will develop within our overall strategy. We need an evaluator who will help us to prioritise what is to be included in the evaluation and the value of evaluation across these areas to programme delivery and effectiveness, accountability and future learning. **How will you help us to do this?**

*Working with vulnerable audiences*

- We recognise that there are challenges to developing sensitive evaluation approaches for vulnerable audiences, especially when collecting data on our intended outcome areas. Ethical issues will need to be fully considered and participants may need to be supported to participate in the evaluation. Tools and materials developed and used in the evaluation will need to be appropriate and tested with the range of populations to ensure they are suitable. **What experience do you have in this area?**
- Other ethical issues should be considered in the proposal for the evaluation. **Please outline these.**

*Standards of evidence*

- An important consideration to inform decisions about the structure of the evaluation will be standards of evidence required by different funders and stakeholders who may support the Campaign to End Loneliness beyond the funding provided by Big Lottery Fund. **How will you help us manage this issue within the scoping of the evaluation and what are your views on this?**

*Local activities*

- The Campaign will deliver activities on a local level. Levels of input in our four campaign areas may vary depending on the particular situation. The evaluation needs to be able to reflect the contexts we are working in and evaluate the various strategies we deploy with different intermediaries (businesses, community institutions, policy makers and civic society) as well as helping us understand the sorts of impacts we have achieved across diverse and heterogenous populations. This information in turn needs to inform our recommendations as to how models such as these could be applied in other environments. **What sorts of approaches are you aware of that would be helpful in this endeavour?**

*Evaluating a co-creation and test and learn work programme*

- The Campaign's work programme is collaborative and will involve older people. Advisory Groups, involving older people, for each campaign area will be established.  **What this means in terms of challenges for the evaluation is…. Please give an indication of how you would approach this.**
- Tenderers should outline any experience they have in evaluating test and learn work programmes or similar, and how they adapt and respond to changes in the work programme as anticipated throughout such test and learn evaluations.

- We would like to involve older people themselves from each area – ideally through some sort of creative evaluation method such as film, vox pops, connections diaries. This could be led by the advocates in each of the areas.

### 3.4 Budget

The maximum budget for evaluation (2017-2020) is £150,000 inclusive of VAT.  We anticipate the budget to be allocated as follows.  There is a separate budget for the dissemination of the learnings from the work programme which this evaluation will be integral to.

Year 1 budget - £45,000 inclusive of VAT

Year 2 budget - £30,000 inclusive of VAT

Year 3 budget - £30,000 inclusive of VAT

Year 4 budget - £45,000 inclusive of VAT

## 4   Tender requirements

Tenders should be no longer than 25 pages and should provide the following information and please refer to the detail we require from you below: Please include in whatever order is most appropriate:

- Provide an indication of your proposed method/s for evaluating the project and its different strands. An outline of your understanding of the outcomes we are trying to achieve, the landscape we are working in, the challenges and opportunities available to us, including your answers to the questions posed above in 3.3. Please note that as per the timetable and budget points this will be indicative and methods will be finalised following appointment and in conjunction with the Campaign team.

  - Outline the experience you have in working with steering groups and engaging users in developing and applying evaluation approaches and methods, and balancing leadership and responsiveness

  - Outline your understanding of impact evaluation and set out any experiences you have applied in evaluating complex programmes such as this where outcomes are jointly owned and shared with other stakeholders and tracing causal pathways and impacts is challenging

- Outline your understanding of formative / developmental evaluation and set out any experience you have in evaluating programmes that are evolving and co-produced, including how you have been proactive in identifying evaluative opportunities that can generate useful evidence and learning to contribute to programme adaptation and optimisation.

- Outline of the main risks you foresee and initial ideas for how these can be managed
- Relevant information about the organisation(s)
- The names and relevant experience of staff members involved and their expected contribution. Please include CVs of staff as an appendix (not included in 25-page count)
- Timetable for first six months – please note that this should be indicative and will need to be finalised and signed off after successful appointment and further refinement and agreement with the Campaign team
- Arrangements for administration and management of the evaluation
- Detailed indicative budget for first three months, including a breakdown of staff time commitment to the evaluation (in days) and their daily rates

It is requested that tenders do not exceed 25 pages in length in total (this is a maximum rather than a target length).

**Staff:** The evaluation team should have a high level of expertise and significant experience in conducting high quality research and evaluation. The team should include relevant knowledge about programmes to address loneliness. Tenders should briefly describe the skills and experience of each individual and their expected contribution.

**Ethics:** Tenders should articulate any anticipated ethical issues and problems and how these will be dealt with.

**Professional association:** tenders should set out their membership with professional bodies e.g. Market Research / Social Research Association / UK Evaluation Society and their compliance with professional standards.

**Data protection:** Tenders should set out how their organisations data protection policies and reference their compliance with existing legislation.

### 4.1 Skills and expertise

The key requirements that we are looking for from the partner that we commission are as follows:

- Experience of and expertise in formative and summative evaluation, including process and impact elements, and developing and testing theories of action and theories of change for discrete elements of programmes as well as overall.
- Experience of and expertise in undertaking social research (including quantitative and qualitative methods) to a high standard
- Experience of undertaking evaluations that contribute valuable evidence to programme decision making over time
- Experience in making use of existing evidence and learning outside of an evaluation and integrating it into programme development
- Demonstrable experience and sensitivity to the requirements of work with older people who may be lonely or isolated, or other vulnerable groups
- Demonstrable experience of how to, and the challenges of evaluating activity designed to deliver change in the behaviour of others
- Experience of evaluating or working with organisations that are developing new programmes and approaches
- Strong knowledge of the health and social care sector

### 4.2 Costing

Evaluation costs should be itemised under the following headings:

- Salary costs (to us) for each team member to be involved in fulfilling the contract (along with the day rate and number of days input for each team member)
- Other administrative costs (please itemise what these are)
- Consultation costs
- Travel and subsistence
- Overheads (if applicable)

Costs should be exclusive of VAT and state whether VAT is chargeable. Full cost details of any proposed sub contracts and how these will be managed should be included.

## 4.3 Timetable

The timetable for the tendering process is as follows:

- Tenders invited: April 3$^{rd}$

- Deadline for request for further information – 12pm 21$^{st}$ April

- Submission deadline: 5pm Tuesday May 2nd
- Interviews: week commencing 15$^{th}$ May
- Evaluation partner commissioned: week commencing 22$^{nd}$ May

**The closing date for receipt of tenders is at 5 pm on Tuesday 2$^{nd}$ May**. A full electronic copy of the tender including any annexes and supplementary material as part of one document, in MS Word or PDF format, should be emailed to Marcus Rand at marcus@campaigntoendloneliness.org.uk

**The contract will be awarded by 22$^{nd}$ of May** and work will commence immediately, with (at least a preliminary) an inception meeting held ideally in w/c 29$^{th}$ May.

## 4.4 Shortlisting procedure

Tenders will be evaluated on best value for money: the budget indicated is the maximum budget available for the work, rather than a target spend. The key criteria for scoring the tenders are:

- How well the tender responds to the brief
- Relevant skills and experience of the team, including track record of producing similar work of a high quality and to deadline
- The adequacy and quality of proposed project management and risk management arrangements
- Overall costs

## 4.5 Further information

Further information on the work of the Campaign can be found here – www.campaigntoendloneliness.org.uk.  Should you wish to obtain more information on the detail of the work programme (as of the current stage of development) to be undertaken please contact Marcus Rand at the email address above.  Please so by 12pm on the 21st of April.

Please note the Campaign is in the process of appointing an Evaluation Officer (0.6FTE) who will report to the Executive director of the Campaign and will be the primary interface between the successful organisation and the Campaign staff.