Workshop design and facilitation of Q’s new offer to leaders of national and regional systems

*Project specification*

**Contact:**

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1. About the Health Foundation and Q

The Health Foundation is an independent charity committed to bringing about better health and health care for people in the UK.

Our aim is a healthier population, supported by high quality health care that can be equitably accessed. We learn what works to make people’s lives healthier and improve the health care system. From giving grants to those working at the front line to carrying out research and policy analysis, we shine a light on how to make successful change happen.

We make links between the knowledge we gain from working with those delivering health and health care and our research and analysis. Our aspiration is to create a virtuous circle, using what we know works on the ground to inform effective policymaking and vice versa.

We believe good health and health care are key to a flourishing society. Through sharing what we learn, collaborating with others and building people’s skills and knowledge, we aim to make a difference and contribute to a healthier population.

Q is an initiative connecting people with improvement expertise across the UK. It is being led by the Health Foundation and supported and co-funded by NHS bodies across the UK and Ireland. We have recently secured long-term funding for Q and have entered an exciting phase of consolidating and building Q for the future.

Q’s mission is to foster continuous and sustainable improvement in health and care. To achieve this, we are creating opportunities for people to come together and form a community – sharing ideas, enhancing skills and collaborating to make health and care better.   
  
As part of [Q’s Theory of Change](https://q.health.org.uk/about/q-theory-of-change/), we recognise that effective support from leaders in organisations and local, national and regional systems is important to equip Q members and others with the time, resources and support they need to improve health and care. By providing support for system leaders with responsibility for improvement and learning across national, regional and potentially local systems, we aim to create the conditions for improvement approaches to be more effective and embedded.

We are currently developing a new offer to convene groups of senior leaders responsible for collaborative learning and improvement to:

* Provide them with dedicated creative spaces for peer learning
* Support senior leaders to understand and develop together the conditions needed for people working in improvement to collaboratively learn and improve.
* Do this in a way that exposes leaders to the mechanisms and benefits of convening, the multiple perspectives needed for effective change, and reinforces their understanding of and support for Q.
* As part of the long term strategy for Q’s sustainability, we are developing this as a paid-for offer.

1. Background to project

The work is in the early stages, with a first cohort of Q’s country partners set to start in early 2022, with the plans for scaling to be refined over coming months. Q are seeking a provider to work collaboratively with the Q team to design and deliver sessions for the initial cohort, with potential to then expand the contract to support future cohorts.

The first cohort are Director level leads for Improvement and Learning in England, Scotland, Wales, NI and Ireland and their deputies who lead on Q in their organisations. The Director of Improvement and Q Director from the Health Foundation are also members of this cohort. There may also be 1 or 2 leaders of regional organisations in England. The cohort are all respected leaders and thinkers in improvement and are keen to continue to develop how we support learning and improvement across national and regional systems.

We anticipate working with this group to further develop and shape what’s known collectively about improvement and learning across large systems. Participants are enthusiastic about this opportunity to develop their practice and spot ways to learn and collaborate across the UK and Ireland. From the Health Foundation and Q team perspective, we hope to further refine what’s known in this territory and use what’s developed to inform both our overall thinking in this area and a more established ‘curriculum’ for future cohorts.

We anticipate running 3 or 4 24 hour workshops (potentially from lunch to lunch), with intervening short check in calls for this group in 2022/23 to support this goal. The offer is intended to be multi-year, so while we are commissioning for support for one year initially, we are planning to extend the offer over a longer time period and may seek to extend externally commissioning input as the offer continues and expands to new groups.

Due to the ongoing nature of Covid-19 pandemic, while we plan for the workshops to be face-to-face, we will work with the supplier and expected participants to develop options for hybrid or virtual participation.

The provider will have extensive experience of supporting senior leaders and designing creative and collaborative spaces as well as highly credible knowledge and experience of enabling improvement in complex systems and the issues that leaders face in doing this work. This includes for example, understanding the strategic system-level issues associated with

(a) building cultures and capabilities for improvement and learning within and between organisations

(b) designing learning systems or improvement programmes to support change in particular priority areas

(c) influencing other organisations to create a context conducive to effective improvement and open learning.

The provider will be responsible for developing and facilitating workshops briefs and session plans and delivering them to a high standard, in collaboration with leads from the Q team. We anticipate that members of the Q team will act as the host or play key roles in specific sessions, with the support provider ‘holding the ring’ in terms of the overall flow and participant experience during the workshops, providing expect facilitation for other sessions. Q has developed a strong reputation for high quality, inclusive and creative workshops and we are looking for a supplier who can reflect and further reinforce support for the Q brand among participants, who are key stakeholders for Q.

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| **Details of the work** | Aims and Objectives | To design and deliver up to 4 workshops with shorter check in calls in between for senior improvement leaders: facilitating collaborative and creative spaces for collective learning |
| Overview of the work required | The provider will   * Work collaboratively with the Q team to understand and develop a coherent plan for content for the series as a whole and for each session, iterating as we learn and collating materials and insights for use in subsequent cohorts. * Design engaging, creative sessions to bring the best out of participants and enable space for learning that feels high value for the group and reflects the style and brand of the Q team, tailored as appropriate for this audience. * Design and develop session plans and other workshop materials in line with Q brand guidelines, liaising with participants, content experts, speakers and host * Establish supportive, creative and purposeful peer spaces for participants, liaising with them in advance to shape each workshop and ensuring both the overall plan and the details of the workshops are responsive to their needs as a group and take account of individual requirements and dynamics between individuals * Hold the ring for each workshop and be the first point of contact for participants on all aspects of the event in the run up and during delivery. * Provide written outputs from the sessions back to the cohort in line with Q team expectations * Signpost participants to relevant learning and resources as needed * Help the Q team understand what needs to be in place between sessions for participants * Liaise with Q team members as needed including communications, operations and evaluation. This should include open sharing about the resource requirements for delivering the workshops to inform future cohorts. * Support the Q team to evaluate the programme and understand what insights are being gathered from workshops to support our understanding of both the subject matter being discussed and the best way to develop this offer and inform future cohorts. |
| Accountability | * Principles and ways of working will be defined with the provider at the start of the project. * The provider will be responsible for overall design and delivery of the workshops in line with Q team and participant expectations * The provider will take a collaborative and facilitative approach in engaging others– acting as the lead in organising, delivering and writing up workshops * Especially given the Covid-19 context and emergent nature of this new offer, we expect the supplier to provide clear mechanisms for managing flexibility for the duration of the contract and a proactive approach to learning and adaptation as we go. |
| **Deliverables** | Delivery requirements | Upon selection the supplier will be responsible for all activities related to design, content development and delivery of workshops, with input from Q team as needed. This will include developing content for sessions, developing materials, managing and participating in run throughs with the Q team and participants. facilitating and delivering sessions, collecting and responding to feedback etc.     Between November 2021 and April 2023, the provider will:   * Attend Kick off meeting and monthly reporting * Design workshops and develop workshop materials * Facilitate 3-4 workshops * Design and facilitate inter-workshop calls. * Synthesise content and write up of outputs * Support evaluation and Q’s insight gathering to help us evolve and expand the offer   We propose a flexible, per workshop approach, given the stage of this work, with review of time commitment after each workshop and the potential for the number of workshops or nature of support to both evolve and expand to support subsequent cohorts. |
| Outcomes | Provide peer spaces for senior leaders across the system to support them to understand and enable the conditions for collaborative learning and improvement.  The workshops should provide a positive experience, which participants consider represents a good use of their time and financial commitment and leads them to recommend the offer to others. Participant feedback should demonstrate that the workshops provide:   * Opportunities to reflect on their own challenges and practice in a supportive and safe environment * A top up to morale and resilience, though sharing with others facing similar challenges * Fresh perspectives and ideas, that are practically useful and reinforce the value of bringing together insights from evidence and practice.   This should lead to examples of participants being able to more easily and effectively:   * Translate ideas and approaches shared in the workshops into their own context * Build a robust evidence-based strategy for the work they do in the areas covered by this offer * Ultimately, oversee improvement and learning interventions in their areas which are more impactful and therefore make better use of the resources and expertise available to the health sector. |

1. Instructions for tender responses
   1. The Foundation reserves the right to adjust or change the selection criteria at its discretion. The Foundation also reserves the right to accept or reject any and all responses at its discretion, and to negotiate the terms of any subsequent agreement.
   2. This work specification is not an offer to enter into an agreement with the Foundation, it is a request to receive proposals from third parties interested in providing the deliverablesoutlined. Such proposals will be considered and treated by the Foundation as offers to enter into an agreement. The Foundation may reject all proposals, in whole or in part, and/or enter into negotiations with any other party to provide such services whether it responds to this specification and request for response or not.
   3. The Foundation will not be responsible for any costs incurred by you in responding to this specification and will not be under any obligation to you with regard to the subject matter of this specification.
   4. The Foundation is not obliged to disclose anything about the successful bidders, but will endeavour to provide feedback, if possible, to unsuccessful bidders.
   5. Your bid is to remain open for a minimum of 180 days from the proposal response date.
   6. You may, without prejudice to yourself, modify your proposal by written request, provided the request is received by the Foundation prior to the proposal response date. Following withdrawal of your proposal, you may submit a new proposal, provided delivery is affected prior to the established proposal response date.
   7. Please note that any proposals received which fail to meet the specified criteria contained in it will not be considered for this project.
2. Selection criteria
   1. Responses will be evaluated by the Foundation using the following criteria in no particular order

* Credible knowledge of and the conditions needed at an organisational and cross-organisational level for sustainable change
* Credibility when working with senior leaders including excellent experience in facilitation, coaching and encouraging reflective practice
* Ability to create a safe and inclusive environment for individual contribution; work effectively with group dynamics
* The quality and clarity of the proposal
* Evidence of proven success of similar projects
* A flexible and adaptable approach, and a willingness to work collaboratively with the Q throughout the work
* Ability to work at both a strategic and operational level to support delivery through advice, problem-solving support and challenge.
* Value for money: Financial stability and long-term viability of the organisation (Due diligence will be undertaken on all shortlisted organisations)
* Ability to work with others to enable learning
  1. It is important to the Foundation that the chosen provider can demonstrate that the right calibre of staff will be assigned to the project; therefore, the project leader who will be responsible for the project should be available for an interview on the date below.

1. Selection process
   1. An information call for people interested in applying will be held on 11.30 on Monday 1 November, with a recording available to anyone not able to attend.
   2. Please email electronic copies of your full proposal plus any accompanying documents to [q@health.org.uk](mailto:q@health.org.uk) by 12.00 Friday 9 November A response to your application will be made by 17.00 Tuesday 16 November
   3. Interviews will be held on mornings of Monday 22 and Wednesday 24 November
   4. Final decision will be communicated by Friday 26 November
   5. We would like to run a kick-off meeting with chosen supplier on Wednesday 8 December 2021.
2. Confidentiality
   1. By reading/responding to this document you accept that your organisation and staff will treat information as confidential and will not disclose to any third party without prior written permission being obtained from the Foundation.
   2. Providers may be requested to complete a non-disclosure agreement
3. Conflicts of interest
   1. The Foundation’s conflicts of interest policy describe how it will deal with any conflicts which arise as a result of the work which the charity undertakes. All external applicants intending to submit tenders to the Foundation should familiarise themselves with the contents of the conflicts of interest policy as part of the tendering process and declare any interests that are relevant to the nature of the work they are bidding for. [Download the policy from the Health Foundations website](https://www.health.org.uk/sites/default/files/2020-12/Conflicts%20of%20interest%20policy%20and%20procedure%20%20%28updated%20November%202020%29.pdf).

Specification Response

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| Response to: |  |
| Name of applicant: |  |

**Contents:**

1. About your organisation
2. Proposal
3. Management and communications
4. Details of team members
5. Resources
6. Contract

**In addition, suppliers can provide an overview of their offer in a format of their choice – please bear in mind assessors will have limited time to review each proposal, so this element should take no more than 15 minutes to read / absorb.**

1. About your organisation
   1. Organisation details

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| Organisation Name |  |
| Type of organisation |  |
| Company or Charity Number |  |
| VAT Number (if applicable) |  |
| What was your organisation’s income in the most recent financial year? *(Not applicable for public bodies/universities)* |  |
| Address |  |
| Registered Address (if different) |  |
| Website Address |  |
| Primary contact name including position and title (to whom all correspondence will be addressed) |  |
| Phone numbers (office and mobile) |  |
| Address |  |
| Email address |  |

* 1. Organisational description

Please provide a brief description of the organisation in terms of its activities/services and the organisational governance and management structure

1. Proposal
   1. Please use this section to provide an overview of your proposal

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Please give us the details of your proposed approach remembering to refer back to the Project Specification. Your proposal must include detailed plans ensuring the following issues are addressed:

* 1. How will your proposal meet the needs of the Health Foundation?
  2. Your approach and methodology
  3. Your relevant experience and expertise. Please share a case example of how you scoped and delivered a workshop involving senior leaders. You may wish to attach additional planning documentation to show your process.
  4. Capacity to deliver and value for money
  5. Any other relevant information

1. Management and communications
   1. Please use this section to describe how you envisage working with the Health Foundation and the other stakeholders in this work. Additionally, please give details of how you will ensure we are kept informed of the project's progress

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* 1. Please provide a project management plan.
  2. Please consider any risks in relation to the proposal and how you will mitigate against these.

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1. Details of team members
   1. Please provide details of the key members of your team who will be working on the programme of work. Please copy the table below to include additional team members.

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| --- | --- | --- | --- |
| Name | **Title** | **First Name** | **Last Name** |
| Relevant experience for this project |  | | |
| Roles and responsibilities on this project |  | | |

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| --- | --- | --- | --- |
| Name | **Title** | **First Name** | **Last Name** |
| Relevant experience for this project |  | | |
| Roles and responsibilities on this project |  | | |

1. Resources

We require full costing of your proposal. Please fill in the budget template and submit it alongside this application.

The Health Foundation wishes to maximise the return it provides to beneficiaries and obtain best value from external suppliers.

* 1. What is the total cost of your proposal? Please include VAT in your costing.

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* 1. Please provide full justification for your costs, including the time spent on the project by each member of your team and all other relevant costs.

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1. Supplier references

Please note that if you/your organisation has not worked with THF before we will be contacting your references if you are shortlisted for interview or if you are the only supplier.

Name, address, phone number and email address of first referee:

Name, address, phone number and email address of second referee:

1. Contract
   1. Do you agree to all the terms and conditions in our Sample contract (attached alongside this document)? If not, please give details.

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Signed on behalf of the organisation:

Name:

Position:

Date: