

# Business Development Strategy for Q

Developing and refining a strategic approach to income generation in Q

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## **1.0 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. Through working proactively with partner organisations, we hope to further leverage the power of the community to achieve positive impact at scale.

## **2.0 Background to project**

The central costs of Q have been funded to date by the Health Foundation in partnership with NHSEI, and other country partners within the United Kingdom and the Republic of Ireland. The value of Q's offer to our current partners is clear, and both funding and in-kind contributions have been substantial.

We will keep a focus on maximising the value Q offers our current partners, as a key foundation for Q's sustainability to 2030 and beyond. Q also aims to diversify and grow its funding in order to achieve impact at greater scale.

Building relationships, underpinned by income, with the right range of funders, is intended to support Q to respond to the priorities and needs of national, regional, and local systems. A strategic approach to income generation will support Q to align with other organisations that share our ambitions to improve health and care.

Establishing a strategic approach to business development is expected to support Q to develop its offers, within available resources, consistently, as well as setting out the optimal opportunities to pursue. A systematised approach to income generation, linked to our values and mission, will support Q to not only optimise the Q initiative's existing infrastructure, but also boost the resources available to its members and its influence in the

health and care system, for example, by increasing the funding that we're able to pass on to our members.

To date, Q has conducted a variety of activities to evaluate, understand and measure its offers to members. In 2019 Q developed the 'Future Q' strategy, which describes plans for the long-term future of Q, articulating what Q aims to deliver from 2020 to 2030 and how it will be organised and funded. This document secured support from the Health Foundation and our current partners, with funding agreed in principle to 2030, subject to a strategic review in 2025. While the future Q strategy identified some options for Q's sustainability post 2030 and some ideas for income generation, it was intended that more a developed strategy would be agreed and tested in time to inform the review in 2025 and planning for the next phase to 2030.

The future Q strategy sits alongside our Theory of Change which articulates how Q achieves impact. To support this Q has established an infrastructure, brand and set of activities and offers that inspire and enable the Q community to learn, share and collaborate. In 2020 RAND conducted an independent evaluation of Q, which describes how the infrastructure and activities are being received, and the early benefits members and organisations are reporting.

Q is now looking for an external organisation to work alongside Q to build on the existing resources and thinking to carry out a market assessment, to test Q's value propositions and lead the development of new business models.

The provider will have extensive experience in supporting organisations in scoping and designing business development strategies. They should have highly credible knowledge of how best to engage stakeholders within the health and care sector. They should also be able to assess how value is created for current Q funders, conduct market mapping and business model testing.

<b>Details of the work</b>	Aims and Objectives	<p>To develop a shared understanding between the Q team and key stakeholders of what we aim to achieve in terms of business development and how increasing income can create more opportunities for Q to deliver impact at scale.</p> <p>The strategy will set out overall aims, the principles we will use to generate income, an understanding of the key needs of potential customers and the value proposition that Q presents.</p> <p>This should enable some new business models to be tested within the financial year 2022/23, and to inform the strategy review in 2025</p>
	Overview of the work required	<p>The first stage will be to work with the Q Leadership Team (QLT) to establish some of the underlying principles that will guide how Q will approach income generation and diversification. For example, ensuring that income generated supports Q to influence change at scale and aligns with our ultimate goals as an</p>

		<p>initiative. These would build upon the Options Appraisal set out in Future Q.</p> <p>We will seek to clarify the ultimate goal of evolving our approach to business development. This will look at what our funders are looking to achieve and how we have created value to date. It will also consider how to generate further income, and the models that support it, relate to the three options established in Future Q, for Q's future beyond 2030.</p> <p>The business model and market options will be used to frame a discussion with the Q Finance and Risk Committee in the first instance around potential options. The advice of the board can then be used to develop the funding strategy.</p> <p>A small number of potential business opportunities for Q will look at customer segments, key activities that would need to be done, resources that would be required to deliver those activities and revenue and cost structures. These models will be supported by values propositions.</p> <p>As part of this process, we will consult a jointly agreed focused group of stakeholders including:</p> <ul style="list-style-type: none"> <li>• Advisory Board members</li> <li>• Existing funders</li> <li>• Potential customers</li> <li>• Team members</li> <li>• Community members</li> <li>• Other Health Foundation stakeholders and initiatives (i.e., THIS and IMPACT)</li> </ul>
	<p>Accountability</p>	<ul style="list-style-type: none"> <li>• This project will report to Q's board, though Q's Finance and Risk Subcommittee. Project delivery will be steered by a project board made up of subcommittee membership, Q Leadership Team representation and the contracting organisation. In order to expedite engagement, the project board will manage the process of strategy development and support connections between the contractor and stakeholders</li> <li>• Principles and ways of working will be defined with the provider at the start of the project.</li> <li>• The provider will be responsible for overall design and delivery of the strategy development project in line with expectations from the Q team and project board.</li> </ul>

		<ul style="list-style-type: none"> <li>• The provider will take a collaborative and facilitative approach in engaging others– acting as the lead in organising, delivering, and writing up information gathering and sharing sessions.</li> <li>• Given the emergent nature of this work and the variety of potential models which may arise, 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.</li> </ul>
<b>Deliverables</b>	Delivery requirements	<p>Upon selection the supplier will be responsible for all activities related to the market mapping, design of business models and design of tests to support strategy development. Working alongside the project board and wider Q team, the supplier will develop principles and a process upon which the development work will sit. In addition to the key activities outlined in the project overview above, the supplier will:</p> <ul style="list-style-type: none"> <li>- Attend a kick-off meeting and monthly status update check-ins</li> <li>- Manage the project timeline and deliverable generation</li> <li>- Schedule and manage external engagement points with stakeholders.</li> <li>- Support the project team in communication with the project board and wider Q team/leadership.</li> </ul>
	Outcomes	<p>The process will provide insight into the wider market and potential organisations that can contribute to Qs income generation goals. This insight can also be used to better understand delivery and pricing models for various Q services, in order to set realistic income generation targets. This work will also help Q to understand the staff or contractor capacity needed to meet income generation targets</p> <p>The resultant strategy will also inform the way that Q models resource development including future work force planning.</p> <p><b>Project deliverables</b> Three key products will be delivered as part of this work:</p> <ol style="list-style-type: none"> <li>1) Market assessment of potential opportunities for Q</li> <li>2) Value propositions that set out how individual Q offers align with customer needs</li> <li>3) Testable business models that will support Q to grow</li> </ol>

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### Indicative Timeline:

Invitation to tender is released	<b>5 July, 2022</b>
Provider Event	<b>8 July, 2022</b>
Deadline for applications	<b>20 July, 2022</b>
Interviews for shortlisted participants*	<b>26 July, 2022</b>
Provider selected and informed	<b>1 August, 2022</b>
Contract issued	<b>1 September, 2022</b>
Initial phase/information finalised for presenting to the Q board	<b>November 2022</b>

*\*Please note that a short presentation on your organisation's proposed approach will be required at interview stage*

### 3.0 Instructions for tender responses

- 3.1 The Health Foundation reserves the right to adjust or change the selection criteria at its discretion. The Health 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.
- 3.2 This work specification is not an offer to enter into an agreement with the Health Foundation, it is a request to receive tenders from third parties interested in providing the deliverables outlined. Such tenders will be considered and treated by the Health Foundation as offers to enter into an agreement. The Health Foundation may reject all tenders, 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.
- 3.3 The Health 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.
- 3.4 The Health Foundation is not obliged to disclose anything about successful tenders, but will endeavour to provide feedback, if possible, to unsuccessful organisations.
- 3.5 Your tender is to remain open for a minimum of 180 days from the tender response date.
- 3.6 You may, without prejudice to yourself, modify your tender by written request, provided the request is received by the Health Foundation prior to the tender response date. Following withdrawal of your tender, you may submit a new tender, provided delivery is affected prior to the established tender response date.
- 3.7 Please note that any tenders received which fail to meet the specified criteria contained in it will not be considered for this project.

#### **4.0 Selection criteria**

4.1 Responses will be evaluated by the Health Foundation using the following criteria in no particular order

- The quality and clarity of the tender, products, or services
- Evidence of proven success of similar projects / evidence of adaptability of any existing products to be used
- Value for money
- Established relationships within the health and care sector that can be used to better understand the nature and scale of the market
- Experience in supporting organisations in scoping and designing business development strategies.
- Credible knowledge of how best to engage stakeholders around this topic
- An understanding of the context of income generation in the voluntary, community and charitable sector.
- Experience/ability in assessing how value is created through market mapping and business model testing.
- Ability to communicate in a clear and compelling way with a range of stakeholder audiences.
- Strong agile project management approaches, working collaboratively with client in a responsive and flexible way.

4.2 It is important to the Health 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 present during the panel interviews if you are selected.

#### **5.0 Selection process**

5.1 Please email electronic copies of the completed tender form and budget plus any accompanying documents to Kate Allison – [kate.allison@health.org.uk](mailto:kate.allison@health.org.uk) by 5PM (UK) on Wednesday 20 July 2022.

5.2 A response to your tender will be made by 22<sup>nd</sup> July 2022.

5.3 Interviews will be held on Tuesday 26 July, 2022

5.4 Final decision will be communicated by Monday 1 August 2022.

5.5 Start date to be agreed following the final decision [and would be as soon as practicable].

#### **6.0 Confidentiality**

6.1 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 Health Foundation.

6.2 Providers may be requested to complete a non-disclosure agreement

#### **7.0 Conflicts of interest**

- 7.1 The Health Foundation's conflicts of interest policy describes how it will deal with any conflicts that arise as a result of the work that the charity undertakes. All organisations intending to submit tenders to the Health Foundation should familiarise themselves with the contents of the policy as part of the tendering process and declare any interests that are relevant to the nature of the work they are tendering for. The policy can be found and downloaded from the Health Foundation's website at the following location: [Policy on conflicts of interest](#)



# Specification Response

<i>Response to:</i>	[Insert name of project in specification]
<i>Name of organisation submitting tender:</i>	

## Contents:

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

## 1.0 About your organisation

### *Organisation details*

Organisation name	
Type of organisation (if you are a private individual / sole trader, see section 1.1 below)	
Company or charity number	
VAT number (if applicable)	
What was your organisation's income in the most recent financial year? ( <i>Not applicable for public bodies/universities</i> )	
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	

- 1.1 If you work under a personal service company you should be aware your tax status will need to be assessed under our IR35 protocols for each separate engagement with the Health Foundation. If you work as a private individual or as a sole trader we will need to look at your tax status under the wider off-payroll working rules to assess whether each engagement is that of someone who is self-employed for this engagement, and paid by invoice, or whether the engagement looks like that of an employee where tax would need to be paid on an engagement through an umbrella company.

*Organisational description*

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

**2.0 Tender**

- 2.1 Please use this section to provide an overview of your tender including your approach and methodology

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

- 2.3 Your relevant experience and expertise

- 2.4 Capacity to deliver and value for money

2.5 Environmental sustainability, Diversity & Inclusion and Safeguarding – detail which of these areas you have an organisational policy on, and how your work for the Health Foundation will take each of these into account.

2.6 Any other relevant information

**3.0 Management and communications**

3.1 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

3.2 Please provide a project management plan.

3.3 Please consider any risks in relation to the tender and how you will mitigate against these.

**4.0 Details of team members**

4.1 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.

Name	Title	First name	Last name
Relevant experience for this project			
Roles and responsibilities on this project			

Name	Title	First name	Last name
Relevant experience for this project			
Roles and responsibilities on this project			

Name	Title	First name	Last name
Relevant experience for this project			
Roles and responsibilities on this project			

Name	Title	First name	Last name
Relevant experience for this project			
Roles and responsibilities on this project			

## 5.0 Resources

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

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

5.2 What is the total cost of your tender? Please include VAT in your costing.

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5.3 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. Please note that it is a

requirement that all of your staff engaged on providing deliverables to the Foundation are paid at least the living wage.

## 6.0 Provider references

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

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

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

## 7.0 Contract

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

Signed on behalf of the organisation:

Name:

Position:

Date: