# Invitation to tender

Q community website

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Prepared by:

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**Deadline date: 10.00, 23 October 2023**

Attached documents include:

* Cyber and information security PQQs
* Expression of interest form
* Website requirements

## Purpose of this ITT

This project is to commission a digital agency to redevelop the Q website.

The provider will embed themselves in the work of the Q team, examining our existing materials, data, user insights and journey maps, and conducting workshops with the team to understand our needs and the needs of our users’.

Via this short period of discovery, the provider will refine, scope and prioritise the requirements already gathered, and use these to inform the design, content and functionality of the new digital platform.

Following this, the provider will design and develop the front and back-ends of the new website, ensuring key applications are integrated, migrating content, and testing and launching the final product.

## About the Health Foundation

The Health Foundation is an independent charitable organisation working to build a healthier UK.

Health is our most precious asset. Good health and wellbeing enables us to live happy, fulfilling lives and frees us up to achieve our potential. It fuels our prosperity – a healthy and productive labour force is the engine that powers our economy. And it helps to build a stronger society by enabling us to play a full part in family life, make social connections and contribute to our communities.

Our health is shaped by a range of factors including our early life, the work we do and the income we earn, the education we receive and the homes and places we live in. The health and care system should support good health and wellbeing by enabling everyone to access the high-quality treatment, care and support they need, when they need it.

Yet, good health remains out of reach for too many people in the UK. Improvements in life expectancy have slowed. We compare poorly with other leading nations on some important aspects of our health, such as cancer and heart disease. Deep inequalities in health between our poorest and wealthiest communities have widened. Meanwhile, health and care services are under huge pressure and struggling to provide access to timely, high-quality care.

It doesn’t have to be like this. By valuing our health as an asset, investing in health and care services and focusing on the wider factors that shape our health and drive inequalities, we can build a healthier nation.

## About Q

Q is a community of thousands of people across the UK and Ireland, collaborating to improve the safety and quality of health and care. We share our knowledge and support each other to tackle challenges. Together, we make faster progress to change health and care for the better.

Members are at the heart of Q. The community thrives on its diverse range of skills, knowledge and perspectives. We inspire and support each other every day to deliver improvements to health and care. We develop our methods and share insights as we do so. And with a community spanning health, care and lived experience, we find new and inclusive ways for everyone to progress.

Q is delivered by the Health Foundation and supported and co-funded by partners across the UK and Ireland.

## Background to project

We are seeking to appoint a digital agency to redevelop <https://q.health.org.uk/>; the website for the Q community.

The Q community has been operating since 2015, when it was designed together with 231

founding members. It has evolved considerably since then, from a small project team working to co-design an early-stage concept, to a multi-strand initiative with its own communications team, brand, channels and platforms supporting over 5000 members.

Q has a standalone website, distinct from the main Health Foundation site. This is because it operates as the home for the Q community and offers online community functionality for members to collaborate and engage with Q’s offers, including our participatory funding offer, Q Exchange. Content is cross-promoted between the Q and Health Foundation websites.

The current digital infrastructure that supports key audiences to engage with Q is delivered primarily via the website (q.health.org.uk). This is supported by digital communications activities delivered through Q’s Twitter, LinkedIn and email accounts.

The current website was launched during the design stages of Q, and since then has been through several phases of development. It now no longer meets our users’ needs.

Our ambition for Q’s digital infrastructure is to deliver the best user experience possible. We want our tools and channels to meet the needs of members and key audiences in the ways they want to engage and connect. Our research has shown that our current site falls short of this ambition.

Last year, we worked with Zoe Amar Digital to develop a digital strategy and roadmapfor Q. As part of the strategy development, we developed a digital vision for Q:

*By April 2025, Q will be using digital to achieve the following:*

*We will create spaces for our audiences to engage that feel personalised and relevant to people. Where a space already exists, we will go to them. We will make digital accessible to all, regardless of background and skills, using data and insight to meet external and internal user and partner needs and expectations. ​*

The most significant project in our digital roadmap is procuring and developing a new website for Q.

## The current Q website

Q’s current website can be found at <https://q.health.org.uk/>. It was launched in 2016 and is built on WordPress.

The website is the main hub of activity for the Q community. It’s the place where members can find and connect with peers, join online groups catered to their interests, read news and blogs, sign up to events, access resources, and apply for funding. There is also content on the site that can be accessed by non-members, and users are able to create guest accounts so that they can participate in our online group spaces.

#### Online community

At its heart, Q is an online community. While there is a large part of activity that takes place offline and in other spaces, having spaces where the community can connect and collaborate is essential to ensuring that the community thrives. The current online community functionality is provided by WordPress add-on BuddyPress and was added to the site in 2017. Since the addition of BuddyPress the community has grown exponentially and online community technology has advanced significantly. The currently functionality is clunky and outdated, limiting the types of interactions and engagements that users can make.

#### User accounts

A core part of our current site are user accounts for our members and guests. Member accounts are central to our member directory, allow members to access member-only content, share their own content (blogs, events and resources) and are required for users to interact within our online group spaces. We currently have over 5,300 member accounts and 1,700 guest accounts on the site. The smooth transfer of these accounts to a new platform is going to be an essential part of the new site development, ensuring that the transition is as seamless as possible for users.

#### Q Exchange funding programme

Q Exchange is our flagship funding programme. Through Q Exchange, members collaboratively develop improvement project ideas with the potential to create impact across the health and care system. The application process happens openly and transparently on the Q website, where members from across the UK and Ireland develop, refine, and submit their improvement ideas for funding. The final stage of the programme sees the community vote for which ideas should receive funding, this happens via the site and votes are submitted and independently verified by Civica Election Services.

#### Content structure

As the community has grown and evolved, as has our content structure on the website. There are currently four main content types on the site, Blogs, News, Events and Resources. These content types no longer meet all our needs and we often have to adapt them for the different types of content we are producing. There are also no clear guidelines for how these content types are used. We need to both evolve our content types and migrate existing content when redeveloping the new site.

#### Existing research

Several pieces of work have already been undertaken to better understand the purpose and performance of the Q website, and to develop a future strategy and roadmap. These include:

* Digital Strategy development (2022)
* User journey mapping (2023)
* Online groups discovery project (2023)
* Content audit (2023)

We also have several sources of insight that we can call on:

* Website surveys
* Q Member surveys
* Q Application Process - Evaluation survey
* Evidence and Learning Summary
* Participation Strategy development
* Internal stakeholder interviews

## What Q needs now

#### Improved member directory

As Q grows, so does our reach. However, there is a need for us to better raise the profile of Q members and their work. Both within the community and to others in the sector, with easier ways to see and connect to the wealth of insight and knowledge within our growing network of people working in improvement. To increase visibility and credibility of improvement we require more sophisticated technology to help evolve our member directory and tools for connection.

#### Improved online community

There is also an opportunity for us to better exploit the network effects of an online community with a critical mass of users. To do this, more advanced online community functionality is required, helping us to benefit from advances in technology and the behavioral change theory that supports communities to thrive. The online groups discovery project identified that much of the functionality that users are familiar with, and expect to see, is not available on the current platform. We are keen to consider how a white labeled community platform might help meet our users’ needs while also providing a platform that we can develop and evolve over time as the community grows and community technology advances.

#### Better ways to surface learning and activity

Within the community there is a lot of activity happening. However, the current sitedoes not externally reflect that activity. This can mean that users are not finding the information and spaces that they need. We want to better harness the activity happening within the community to engage users and direct them to the content and spaces that will best support them.

#### Improved access to funding

Q offers members and partners several opportunities to apply for funding for their projects and work. The highest profile of our funding programmes is Q Exchange. Through Q Exchange, members collaboratively develop improvement project ideas with the potential to create impact across the health and care system. The application process happens openly and transparently on the Q website, where members from across the UK and Ireland develop, refine, and submit their improvement ideas for funding. We need to improve the digital elements of Q Exchange and to find digital solutions that help us better surface and share the learning from our all our funding programmes. The development of digital improvements for Q Exchange will tie into wider reviews of the funding programme’s processes.

#### Evolved content structures

As Q has grown so has our output of content for our audiences. Research and user insight tells us that we need to evolve our content structures to better present information in the right format at the right time. We also want to embed the learning from our funding programmes and insight work in our wider site content, ensuring that the learning being surfaced is accessible to the community.

#### First class accessibility

Our digital strategy sets clear ambitions for us to meet the highest standards of accessibility possible**.** Q requires digital platforms that will ensure we are aiming to meet WCAG 2.0**.**

#### Users at the centre

As Q’s current site developed, it was often led by internal needs, resulting in a site structure that might not match our users’ needs. We are now in a better position to develop a new platform that starts with insight needs and will ensure better experience for those visiting the site. We want to take a user-centric approach to decisions during the website development process including regular cycles of user testing.

## What we are looking for

#### CMS

We are notwedded to a specific content management system**.** However, it's important for us to have CMS that meets our front-end user needs while being easy to use for staff.

#### Integrations

Our current site is not integrated with our internal systems, i.e Salesforce. We are looking for platforms that will offer two-way integration with our internal systems, while also beingflexible. Ensuring that data, in particular user accounts, are integrated with our internal CRM and any other connecting platforms is essential to ensuring security of the data we hold and seamless experiences for users.

#### Online Community integration

Our current presumption is that, to provide the best community functionally, this work will involve procuring an online community platform that integrates with the website (possibly white labelled). It's imperative that this solution integrates seamlessly with the front-end website and that user data is connected.

#### A site that will evolve

The site we procure now needs to be able to evolve and grow with Q for the next few years. Therefore we will need to consider the longevity of the solutions we procure, and the on-going costs associated with development.

#### Content workflows

Many of our current workflows take place offline and can be a burden on resource. We are looking for a platform that will provide workflows that both streamline our ways of working but also ensure a better experience for users when submitting content for the site.

## Details of the work required

Internal stakeholder interviews have been undertaken by a Business Analyst, alongside document analysis, with the aim of gathering initial requirements for the new Q website.

We expect the chosen digital agency to do more work to refine, prioritise and scope these requirements. Please see the 'Q Website Requirements’ document attached, for a full list of requirements.

Some of the overarching principals we have taken from our requirement gathering include:

* Clear and intuitive navigation, taxonomy and information architecture.
* Easy and varied ways for people to connect, co-create, and participate via the website.
* Flexible and engaging page templates that allow for different content types and formats. A good balance between dynamic and static content, better showcasing fresh content like events, news and blogs.
* Down to earth, welcoming and approachable design that showcases our brand and diverse community.
* Fast and responsive platform that works across a range of devices, browsers and operating systems.
* A robust and secure platform, underpinned by a CMS that is easy to use and can grow with our ambitions.
* Excellent optimisation for search engines, compliant with the latest Google guidance.
* Accessibility at the forefront and WCAG 2.0 compliant.
* Seamless and flexible integrations, a platform that has integrations with other systems readily available.

### Deliverables

We require an agency to project manage, build and launch the new Q website. As part of this piece of work we would expect the following to be included in the delivery:

* Discovery - requirements refinement, scoping, prioritisation and detailed phasing plans
* Information architecture development
* Online community build, integration and launch
* Design planning and wireframe production
* Content planning, production and migration
* Data migration plan / approach and delivery, ensuring a seamless transition for our existing users
* Development
* Testing, including user testing
* Close-down of old, existing site – with provisions made for migrating content, 301 redirects from old URLs to new URLs, and controlled process for DNS switch over.
* Launch

On completion of this work, we expect the following deliverables:

* A new Q website including online community functionality
* A supporting CMS
* CMS training / support documentation
* Website requirement documentation

### Data and reporting requirements

Our current our data and analytics setup are fairly basic. We have Google Analytics 4 and HotJar implemented on the site, as well as Google dashboards.

With the new site, benchmarking and measurement will be very important, particularly when it comes to member engagement. We would like to work with a digital agency that can help us implement Google Analytics 4 to a high standard and explore how we can effectively leverage our website participation data to inform our digital activity and better personalise the user experience.

We are particularly interested in the ability to:

* Easily collect, view and export website engagement metrics.
* Measure and analyse user journeys (e.g. see where drop offs are to better understand the engagement of members and non-members).
* Gather demographic data.
* Compile dashboards that help teams to set targets and strategies, to funnel users through to different levels of engagement.
* Use data to spotlight members in more engaging and user-friendly ways.
* Gather and use data for segmentation and marketing in more sophisticated ways.
* Use data to reactivate dormant and inactive members.
* Gather data that can help showcase Q’s impact.
* Gather data that will enable personalisation (e.g. collecting content preferences and interests to help with surfacing relevant and related content).
* Capture data on users expressing interest in joining, so that we can market to them more effectively.
* Profile how engaged individual members are, in line with GDPR compliance (e.g. how many discussion threads somebody engaged in, how many items they read, their dwell time, etc).

### Service Level Agreement

We are looking for an agency that we can partner with for the long term. We envisage the Q website will require multiple development phases. We also require the following maintenance and support services for the Q website to be held under a support contract with a service level agreement:

* Service desk – to be available to monitor our website and respond to any issues/bugs raised either via a ticket being issued by the Q team or by the internal IT service desk.
* Infrastructure support – monitoring and maintaining the infrastructure proactively as well as responding reactively to alerts. Dealing with issues such as SSL certificates, CMS upgrades and patches, PEN test issues.
* Ongoing development works – this could be either optimisation projects or development projects.
* Possible SEO support and maintenance.
* A hosting solution with security safeguards, regular back-ups, and the ability to restore our website in a timely fashion.
* A separate annual budget has been allocated for the ongoing development of the site as well as annual hosting and maintenance costs. This is distinct from the budget provided for the website development and build.

### Diversity, equity and inclusion

We are committed to supporting equity, diversity and inclusion both in our internal work and across our wider work to improve the health and care system. It is an important part of how we achieve impact and deliver on our ambitions.

We want to work with a provider that shares our ambitions, values and commitments to diversity, equity in inclusion. As part of this work, we want to build a relationship with a provider where learning, challenge, and growth form part of our core principals.

During the tender process we will want to hear about your EDI priorities and how you integrate equity, diversity and inclusion into your design and build processes.

### Outcome

By Summer 2024 we will have built and launched the first phase of a new website for Q.

### Indicative ITT timeline

Set out below is the proposed procurement timetable. This is intended as a guide only.

|  |  |
| --- | --- |
| Launch of invitation to tender | Wednesday 4 October 2023 |
| Information call | Friday 13 October 2023 |
| Deadline for submission of Expression of Interest (EOI) | 10:00 Monday 23 October 2023 |
| Review and selection | 23 - 30 October 2023  |
| Invitation to submit full proposal | By Wednesday 8 November 2023 |
| Full proposal deadline  | 18:00 Thursday 23 November 2023 |
| Interviews | Monday 27 November 2023 times tbc  |
| Agency appointment | By Friday 15 December 2023 |

### Budget

We are inviting tenders of between £120,000 and £150,000 for the development of our new website.

A separate budget has been allocated for the ongoing support, hosting, maintenance, and development of the site.

### Tender response requirements

Providers are requested to complete an Expression of Interest (EOI) form, which you can download from our website alongside this ITT and email it to Betty-Sue Smith: betty-sue.smith@health.org.uk by 10:00, Monday 23 October 2023.

### Selection process

* Please email electronic copies of your completed Expression of Interest plus any accompanying documents to betty-sue.smith@health.org.uk by **10:00 on Monday 23 October 2023**.
* Those invited to submit a full proposal will be notified by **Wednesday 8 November 2023**.
* Interviews will be held on **Monday 4 December 2023**.
* Final decision will be communicated by **Friday 22 December 2023**.
* Start date to be agreed following the final decision (and will be as soon as practical).

### Selection criteria

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

* Ability to deliver on all required services or outputs
* The quality and clarity of the proposal, products or services
* Evidence of proven success of similar projects / evidence of adaptability of any existing products to be used
* Responsiveness and flexibility
* Transparency and accountability
* 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
* Experience of delivering similar projects involving online communities
* Experience of working with third sector organisations and/or membership organisations
* Knowledge and experience of using design thinking and application of design principals and user-centric approaches in digital projects
* Demonstrated commitment to diversity, equity and inclusion both within your organisation and in project and platform delivery.

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 present during the panel interviews if you are shortlisted.

### Instructions for tender responses

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.

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.

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.

The Foundation is not obliged to disclose anything about the successful bidders, but will endeavour to provide feedback, if possible, to unsuccessful bidders.

Your bid is to remain open for a minimum of 180 days from the proposal response date.

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.

Please note that any proposals received which fail to meet the specified criteria contained in it will not be considered for this project.

#### Confidentiality

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.

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

#### Conflicts of interest

The Foundation’s conflicts of interest policy describes 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. The policy can be found and downloaded from the Foundation’s website at the following location: <https://www.health.org.uk/sites/default/files/2019-02/Health-Foundation-policy-on-conflicts-of-interest.pdf>