

Developing an Associate Model for Q

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About the Health Foundation and the Q community

The Health Foundation is an independent charitable organisation working to build a healthier UK. Everyone has a stake and a part to play in improving our health. By working together we can build a healthier society.

Q is a community of thousands of people across the UK and Ireland, collaborating to improve the safety and quality of health and care.

With members at the heart of Q, the community thrives on its diverse range of skills, knowledge and perspectives. We collectively boost the resilience, capacity and impact of the community when it's needed most. Inspiring and supporting each other every day, we find new and inclusive ways for everyone to progress.

We equip people to bring about change across the sector. By combining our energy and actions, we multiply our power to create more effective, equitable and sustainable health and care. Q is delivered by the Health Foundation and supported and co-funded by partners across the UK and Ireland.

Background to project

Q is in an exciting stage of growth with new partnerships having been recently established to support learning and improving across systems. We have seen an increased demand for the Q community's improvement expertise, and we have ambitions to expand our work and seek income in new ways. So, we would like to establish the best approach and model to coordinate a more substantial contribution of expertise from our community and networks. It is worth noting, despite the increased demand, we are still in the stages of testing this need and 'the market opportunity' so the nature of this tender reflects the need for a phased approach.

We are seeking external expertise to help assess and make recommendations for possible approaches to developing an 'associate model.' Note the 'associate model' is a term we are using for reference in this scoping phase but this may change.

We see associates as people with advanced improvement expertise. They will likely be drawn from Health Foundation alumni, contractors, and networks, as well as the wider Q community.

This work needs to make sense and be compatible with our approach to participation, and how we engage the Q community in our work. We currently work with our members on a voluntary basis through our various activities.

We would like to consider the opportunities for generating income through this model. This should include exploring the opportunities to scale this approach and a robust understanding of the market we would be operating in. Income generation, linked to our values and mission, will support Q to optimise our existing infrastructure. It'll also boost the resources available to our members and our influence in the health and care system.

We also want to consider wider opportunities for the associate model to add value more widely to the Health Foundation. This may be on inception or to consider for future development.

Q is seeking external expertise to help assess and make recommendations for possible approaches to developing an 'associate model.' Note the 'associate model' is a term we are using for reference in this scoping phase but this may change. We see this piece of work forming two phases:

Phase One - Scoping (January - March)

- Supporting Q to develop a clear understanding and vision for an Associate model
- Developing a deeper understanding of the market and competitive environment Q would be operating in
- Scoping the work and making recommendations based on the options, landscape and opportunities for us to develop an 'Associate model'
- Pending approval, to proceed with recommendations. We will then implement phase two which will support the implementation.

Phase Two- Supporting implementation (March – April)

There is scope for the provider to support the second phase of delivery which will be scoped, costed, and contracted separately, areas of work may be as below:

- To co-create a detailed prototype to test through to implementation
- A detailed approach to recruiting Associates
- To support operationalising the model including establishing role descriptions, contractual terms, capacity planning and quality assurance.

Details of the work	Aims and Objectives	<p>Phase One: Scoping (the focus of this tender)</p> <ol style="list-style-type: none"> 1. To conduct a market analysis to enhance our understanding of context and landscape, including different models, methods and providers that exist to coordinate the contribution of formal expertise e.g. an associate or faculty model. 2. To further develop and clarify our vision and proposition for an 'associate model' to support our strategic ambitions. 3. To support our financial modelling and cost analysis of possible approaches to an associate model. Identifying fee-rate structures and market cost rates. 4. To create and test recommendations on the possible models that may best suit Q's needs, including the high-level implementation approach.
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	<p>Overview of the work required</p>	<p>The overarching question informing this piece of work is: <i>What is the best organising model to support the substantial and sustained contribution of our community and network’s expertise to areas for Q’s strategic needs?</i></p> <p>More specifically we would like to explore and clarify:</p> <ol style="list-style-type: none"> 1. Our proposition <p>What is our vision for a more formal structure to draw on our community and network’s expertise? How could we frame and communicate an ‘associate model’ to support our strategic aims? What assumptions may we need to test to assess our needs and ensure value for money in any model we use?</p> 2. Market <p>Who are the current providers of these services, what are their strengths and where would Q have a unique value offer?</p> 3. Roles, functions and quality assurance <p>How do we guarantee a high quality of delivery from the people who work for us? What processes (such as supervision) would we need to be put in place to support quality of delivery?</p> 4. Recruitment, retention, and development <p>What is the possible life cycle of an ‘associate’? What are different ways to recruit a diverse talent pool? How could learning be a core element of this model?</p> 5. Implementation <p>How may we go about implementing a new model? What different scenarios could we test? We’d need an analysis of the possible risks and mitigations for them. What are the different scenarios for scaling up and down?</p> 8. Business Development <p>What are the implications, possibilities, and opportunities for Q to generate income through this approach, whilst ensuring alignment with our mission and values. Are there barriers to entry or scale, if Q Associates want to enter this market?</p>
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Delivery	Delivery requirements	Deliverables – Phase One <ul style="list-style-type: none"> • An inception meeting with the project team to align around the approach, deliverables, and timescales. • Interviews or meetings with relevant Q stakeholders to input into the vision and ideas for consideration, and provide a summary of these conversations. • Regular project touch points to update on progress. • A summary report of recommendations including a review of external market examples. • An analysis of costing scenarios and budget implications with fee rate recommendations and market benchmarks • Presenting the recommendations to the Q Leadership Team and other relevant stakeholders to test and build on ideas.
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Instructions for tender responses

How to apply

Please provide your proposal in the template below outlining:

- Your interest and motivations for supporting and delivering this work.
- Your proposed approach – summarising your understanding of the aims. Please note this tender refers to **Phase One -Scoping only**. Phase Two – implementation will be progressed and costed separately with the chosen supplier.
- Your experience and expertise in the topic area of developing and/or leading 'associate type models'.
- Your availability to deliver the work, timeline of your proposal.
- Detailed budget and expenses – to be completed in accompanying template.

Budget

Please provide a detailed budget and expenses for the work in the accompanying template. The total costs should not exceed £15,000, including VAT

Main contact: Kate Allison, Project Manager, Q: kate.allison@health.org.uk

Tender requirements

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.

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 negotiations with any other party to provide such services whether it responds to this specification and request for response or not.

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.

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

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

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.

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

Selection criteria

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

- How the approach will meet the needs of the Health Foundation
- Clarity of the proposal and understanding of the requirements
- Appropriateness of methods, project plan and risk assessment
- Experience and expertise in the topic area
- Capacity to deliver
- Value for money

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.

Selection process

Please email electronic copies of your full tender plus any accompanying documents
Submit proposals to q@health.org.uk by **13:00 on Wednesday 3 January 2024**

Please note, shortlisted applicants will be invited to interview on Wednesday 10 January, 2023.

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 Health Foundation.

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

Conflicts of interest

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.

Specification Response

<i>Response to:</i>	Developing an Associate Model - Q Initiative
<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

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? (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	

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

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

Tender

Please use this section to provide an overview of your tender

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:

How will your tender meet the needs of the Health Foundation?

Your approach and methodology

Your relevant experience and expertise

Capacity to deliver and value for money

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.

Any other relevant information

Management and communications

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

Please provide a project management plan.

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

Details of team members

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			

Resources

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

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

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

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.

Provider references

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: