Project Specification and Response Form

Quality Management Systems in health and care: understanding their role, learning from practice, and identifying priorities for action

How to apply
If you are interested in submitting a proposal, please read the Project Specification and Response document in full and complete your application. Please ensure that you respond to all questions within your application.

Deadlines
All applications should be completed by 17:00 on **Friday 15 March 2024** and sent to spela.godec@health.org.uk. Please send a completed budget template alongside your specification response form.

We will interview shortlisted suppliers on **Monday 25 March 2024** to explore proposals in depth. Please ensure you are available to be interviewed on this day. We expect to notify the successful supplier by **Friday 5 April,2024**.

Contact:
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The Health Foundation
8 Salisbury Square,
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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.

This project will sit within Q's Surfacing Stories and Insight team, who will act as the lead for the project. The team conducts research and evaluation within health care improvement, to generate and share insight and learning.

Background to project

The overarching aim of this project is to provide a foundation for learning and collaboration around Quality Management Systems (QMS) in health and care across the UK and Ireland. Specifically, this insight project will support the development and implementation of strategic approaches to enabling organisational performance, drawing on improvement principles and building on the concepts of QMS.

In this project, we are using QMS as the working title, describing a range of ideas and activities that build on the founding concepts and terminology of QMS developed by Juran[1]. This work will need to recognise that for many stakeholders, work in this area has evolved to convey a broader set of aspirations for strategically aligned and embedded approaches to organisational performance drawing on improvement principles. Through the process of this project, we anticipate that we will develop a coherent way of describing this field that will connect with the practice and evidence for QMS, while also speaking to evolving approaches to thinking and talking about this work.

Whatever title and terminology we land on, the focus is on efforts to develop a co-ordinated approach to managing either quality specifically or organisational performance more generally, including quality planning, quality control, quality assurance and quality improvement. We are interested in how these different functions that are required for effective performance are embedded within and across organisations, with attention to systems, processes and infrastructure, as well as culture, behaviours and leadership necessary for implementing and sustaining high performance. These enablers and the learning system that is central to many QMS models is of interest alongside the three components of the Juran trilogy. We recognise the complexity and diversity of the field, and we may agree with the supplier to exclude certain contexts.

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[1] Juran, J. M. (2003). Juran on leadership for quality. Simon and Schuster.

The application of QMS concepts at organisational and cross-organisational levels in health and care in the UK and Ireland is relatively 'immature'. The knowledge about different journeys to QMS implementation and its benefits is also limited.

There is nonetheless considerable ambition for these ideas as central to the next stage of how we sustainably improve quality and performance. For example, the developments in this area are now mandated in Wales[2] and increasingly expected in other nations[3, 4]. One of the domains of the NHS IMPACT[5] approach to improvement in England, for instance, focuses on embedding improvement into management systems and processes.

Details of the work	Aims and Objectives	The overarching aim of this project is to provide a foundation for learning and collaboration around 'QMS' across the UK and Ireland. The objectives of this project are to: • Describe the QMS landscape in the UK and Ireland • Provide in-depth examples of QMS, to learn from those who have embedded QMS • Synthesise key learnings about embedding and sustaining QMS • Examine the benefits of implementing QMS • Recommendations to support senior leaders to embed QMS
	Key research questions	• What are the different ways to frame QMS (including but not limited to language, conceptualisations, ambitions and differences between parts of the UK and Ireland)? • What can we learn from QMS examples in different contexts/organisations, of different maturity levels and different journeys? • What are the conditions and enablers that support implementation of QMS? What (if any) are the trade-off in taking a QMS approach? • What has been learnt by those who have built QMS in the health sector over the last decade?

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[2] https://www.gov.wales/sites/default/files/publications/2021-09/quality-and-safety-framework-learning-and-improving_0.pdf

[3] https://ihub.scot/improvement-programmes/quality-management-system/; https://ihub.scot/media/9012/qitoqms-vfinal.pdf

[4] https://www.england.nhs.uk/nhsimpact/about-nhs-impact/embedding-into-management-systems-and-processes/

[5] https://www.england.nhs.uk/nhsimpact/

		•	What is the role of leadership, culture and behaviours in supporting QMS?
		•	What are the potential and realised benefits of QMS within health care?
		•	What is needed to progress QMS work at different levels of maturity and by different stakeholders?
	Target audiences	Primary audience: senior leaders in health and care in the UK and Ireland who accountable for developing how their organisation improves quality and performance.	
		Secondary audiences will include those responsible for implementing a QMS approach in health and care, Q members and people working in improvement across the UK and Ireland.	
		We will work closely with the supplier in order for the Q team to develop key messages and any communications related to the project (e.g., through monthly catch ups, the workshop with the advisory group). The dissemination output(s) will be led by the Q team.	
		We are keen to ensure that the development process of this work supports our wider stakeholder engagement work. Our aim in terms of dissemination is to provide outputs that raise awareness and understanding amongst our target audience.	
	Decisions to be agreed with the supplier	Where possible, the Health Foundation takes a partnership approach to its work. We will want to meet or speak with the provider regularly.	
		The following will be discussed and agreed with the supplier through ongoing engagement:	
		•	Precise focus and scope
		•	Interview topic guide
		•	Selection of interview participants
		•	Selection and structure of case studies
		•	Recommendations for leaders
		•	The format of the final report
		The overall research contract will be managed by the Q team, with an advisory group of Q's country partners and QMS subject matter experts, who will provide strategic and content input.	
		The supplier will be expected to attend an inception meeting (April/May 2024), at least monthly catch ups with the Q team and a workshop with the advisory group (October	

		2024). These meetings will be facilitated by the Q team and take place virtually.
	Overview of the work required	The key deliverable is a report for Q/the Health Foundation which will include three main parts: - As part of scoping the interviews and case studies, a scan of existing academic and grey literature on QMS in the UK and Ireland, to provide an overview and mapping of the current QMS landscape. - Interviews with stakeholders with QMS experience and expertise (n=10-12). These will be identified together with the Q team and the project advisory group. 5-6 case studies of QMS from different geographical areas and different levels of maturity, with a focus on key enablers, challenges and decisions to be made at different stages of the journey. The case studies will be developed from the abovementioned interviews and might include drawing on additional documentation.
Deliverables	Delivery requirements	Our aim in terms of dissemination is to provide outputs that are relevant and actionable. Dissemination will be led by the Q team, though we expect the supplier to consider this within their delivery. The key deliverable for the work will be a written report for Q/the Health Foundation including: - A framing of the QMS landscape in the UK and Ireland - A series of 5-6 case studies (envisaged to be c. two to three pages in length per case study), including: - Example of QMS in practice, with how quality improvement, quality planning and quality control operate together - The role of leadership in embedding QMS - Key enablers and challenges, including the role of external context - Potential and realised benefits of QMS - Decisions and considerations at different stages of embedding QMS - Key learning from the process of embedding and sustaining QMS - A synthesis of key messages responding to the research questions, drawing on the literature review and interview data.

		• Recommendations for leaders
		• Short technical appendix detailing the approach to literature review; an interview guide; list of interviewees; a list of key stakeholders in this field that emerge through the work.
		We will require access to all transcripts and data collected.
		The written report will be shared with the project advisory group for quality review and feedback. The supplier will need to address up to two rounds of feedback.
		The Q team intends to facilitate a workshop to gather input from the advisory group on key messages and recommendations based on the findings from the interviews and case studies. The supplier is expected to participate in the design and delivery of this workshop.
		Q's intention is to create dissemination outputs based on the above deliverables (such as a report, a blog, a webinar).
	Timeline	The research and above deliverable (a written report) should be completed by the end of September 2024.
		We anticipate that the final stakeholder workshop (which the supplier would be expected to participate in) will then happen by the end of October 2024.
Budget		Up to £40,000 including VAT

Ways of working

The work will be managed by Q's Surfacing Stories and Insight team. We will want to engage regularly and collaborate with the supplier on this project; we will agree the nature of updates with the supplier at the inception meeting. We anticipate the supplier will provide agile updates throughout the duration of the study and we will work together with the supplier, once appointed, to agree on the details of how we work together. The supplier will also be required to engage with the advisors (Q's country partners and subject matter experts).

A Privacy Impact Assessment will be submitted by the Health Foundation to the data protection team. If the supplier has not worked with the Health Foundation before they will be required to complete a data protection assessment.

Instructions for tender responses

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 into 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 individuals/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 effected 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:

- Ability to deliver on all required services or outputs
- 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
- Experience in qualitative research, including interviews and case studies
- Expertise and experience in quality improvement
- Familiarity with QMS in health and care in the UK and Ireland

We welcome proposals from individuals or teams.
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 to **Dr Spela Godec (spela.godec@health.org.uk) by 17:00 on Friday 15 March 2024.**

A response to your tender will be made by Wednesday 20 March 2024.

Interviews will be held on Monday 25 March 2024.

Final decision will be communicated by Friday 5 April 2024.

Start date to be agreed following the final decision (and would be as soon as practicable).

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. The policy can be found and downloaded from the Health Foundation's website at the following location: Policy on conflicts of interest

Specification Response

Response to:	Quality Management Systems in health and care: understanding their role, learning from practice, and identifying priorities for action
Name of organisation submitting tender:	

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:

Your approach and methodology to carrying out and synthesising research

Your relevant experience and expertise

Environmental sustainability, Diversity & Inclusion – 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:

Contract

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: