



## Request for proposals (RFP):

# Understanding and co-designing principles for Inclusive Research and Design Practice (IRDP)

## 1. Summary

One of our key CEDI goals is to support Wellcome to fund more research that is inclusive in design and practice. In this research design and development project we will work in collaboration with a supplier to co-develop and co-design a set of inclusive research design and practice principles, guidelines, and case studies that will be used internally to help us achieve this goal. This process will better understand staff knowledge of Inclusive Research Design and Practice and what support and tools they may need to embed and embody the Inclusive Research Design and Practice principles.

This is a first step in building the foundations (e.g. knowledge, practices and systems) to enable us to develop, embed and apply Inclusive Research Design and Practice principles across Wellcome funding. Eventually our work in this area will play an influencing role across the wider research and funding field.

The supplier could be a design consultancy organisation or research group, so long as they have the required expertise, partners, and track record to undertake this work. There is an expectation that the chosen agency will have clear commitments to EDI in and across their work. Further details on requirements are listed in further considerations.

We envisage this work will take place over three stages outlined in the specification below over a 12 month period. The total budget we have for the entire project is £140, 000 plus VAT.

## 2. RFP Objectives

The primary objectives of this work are organised around three phases of activity:

**Phase 1:** to **understand** (*both internally at Wellcome and externally*) who are (or who can become) our **champions and advocates** for inclusive design and research practice and understand their **knowledge and interpretation** of IRDP. Here we will surface the strengths, areas of appetite and opportunity areas, along with surfacing an initial minimum of 10 ideal case studies of inclusive research in design and practice in the wider sector.



**Phase 2:** to reflect on insights and learning from phase one to **inform the process and deliverables of phase 3**. We will **identify key collaborators** (internally and externally) to co-design and co-develop the principles with and begin **engaging with the wider Wellcome** community so they start to become more aware of the value and importance of IRDP.

**Phase 3:** to **co-develop/co-design and finalise a first draft of inclusive research and design principles** that is rigorous, robust and strengthened by leaders of inclusive research and design. Phase 3 will also include the final delivery of a suite of guidelines, set of a minimum of 20 ideal case studies and methods used by external groups who are already embedding inclusive research design and practice in their work in some way.

### 3. RFP Specification

This section sets out the specification of services for this RFP exercise. Suppliers should use this section to fully understand Wellcome’s requirements and to inform their response.

#### Scope of Requirements

The Supplier will provide the outputs as detailed below to support the delivery of the project objectives by meeting the following requirements. These will be developed in line with your proposed methodology:

Phase	Outputs
<b>1: Surface current knowledge and understanding</b>	<ul style="list-style-type: none"><li>A. A piece of research (any format) outlining Wellcome staff’s knowledge and understanding, needs and appetite for engagement in relation to IRDP (Wellcome produced a short report on IRDP with limited number of Wellcome teams that we will share with the successful supplier).</li><li>B. A piece of research (any format, focusing on UK and global practice) identifying 1) individuals or organisations who are leading IRDP work, 2) the state of IRDP for emerging and established external practice, as well as 3) an overall analysis of wider knowledge, understanding, needs and energy for this work.</li><li>C. A suite of a minimum of 15 case studies of external ideal practice in this area (UK and global), ideally focussed on the principles other organisations apply to IRDP in their work, including Wellcome’s past and current portfolio. (This can include the work or approach to inclusive research design and practice, if clear principles are not in place.)</li></ul>

	<p>D. Propose an early working definition of IRDP for Wellcome’s internal use.</p>
<p><b>2: Identify key collaborators and defining phase 3</b></p>	<p>A. Develop a proposed implementation and delivery plan for phase 3, based on insight and learning from phase 1</p> <p>B. Support Wellcome to identify and create an agreed list of collaborators both from within Wellcome and external to Wellcome.</p> <p>C. An agreed working definition of IRDP, to be tested in phase 3</p> <p>D. Work with Wellcome to host at least two engagement opportunities with wider Wellcome, external organisations and grant-holders, such as workshops to present findings from phase 1.</p>
<p><b>3: Co-develop and finalise first draft principles</b></p>	<p>A. Design and facilitate a series of codesign workshops with two working groups (one internal and one external) to develop a first draft of IRDP principles and test the working definition of IRDP with key stakeholders.</p> <p>B. Deliver and present a first draft of IRDP principles.</p> <p>C. Deliver guidelines, tools, and mapped scenarios as part of an engagement programme demonstrating how we can use the principles and how staff can learn to apply them.</p> <p>D. Deliver a final set of a minimum of 25 ideal case studies on how IRDP has been applied in other organisations and potentially as well from Wellcome grantees, how these case studies can be applied within our own context at Wellcome and externally with other funders who may pilot them in the future.</p> <p>E. Produce a clear and strategic action plan for how we can pilot the principles and evaluate their effectiveness going forward.</p>

### Out of Scope

The Culture, Equity, Diversity and Inclusion team works across the breath of Wellcome’s activities focusing on three goals (see section 4).

Although these goals are all interlinked, this project should focus on creating actionable principles for goal 3 and the other goals are largely out of scope. As such the priority focus should be engaging with the Research Programmes and Research Funding teams.

It is important to be aware however that the CEDI team have other workstreams which will be ongoing at a similar time to this project and therefore there may be competing priorities which need to be accounted for in the design of phase 3.



Supporting wider teams on inclusion work (e.g. people, operations) - the priority focus for creating principles is for the science teams (Research Programmes, Corporate Affairs, Research Funding, and Strategy teams)

The Culture, Equity, Diversity and Inclusion team highly value challenge, new perspectives and fresh ideas. Although there is scope to shift how we might deliver on our goals, the high-level goals themselves are signed off and out of scope for iteration.

### **Key information and considerations**

**Evolving skills and expertise across the 3 phases:** Given the complex nature of this project and the learning that will emerge from Phase 1 & 2, we are keen to adapt and iterate to ensure we have the appropriate set of skills and expertise for Phase 3. Whilst we intend to contract a supplier who can deliver on all three phases, at the end of Phase 2, we will take stock to ensure both supplier and Wellcome can reconsider making any necessary changes to the agreement.

**A changing Wellcome:** Wellcome has recently launched a new strategy and subsequently undergone an organisational redesign. Therefore, when engaging with internal colleagues on this project the supplier may need to be mindful that the organisation has not yet recruited all roles, and teams may have reduced capacity to engage with this project. We anticipate that it is still worthwhile to get started on this work, but the supplier will need to manage time flexibly to respond to this reduced organisational capacity.

**Supplier commitments in relation to ED&I:** The supplier must include their individual or organisational position/ethos statement that includes a commitment to equality, diversity, and inclusion. This will need to include how the supplier's ways of working or approach is inclusive and considers a diversity of experience and expertise. This will be considered in the procurement scoring exercise.

### **RFP Background**

Wellcome's EDI strategy sets out our goals over a ten-year period to improve our work and practice as an employer *and* as a research funder. We have the following three goals:

- 1) By 2031, Wellcome staff are representative of the places we work, able to be themselves and supported to be their best
- 2) By 2031, People funded by Wellcome are more representative of the global population, able to be themselves and supported to be their best
- 3) By 2031, all Wellcome funded research is inclusive in both design and practice

Our focus up until now has been to implement internal changes to improve our staff diversity and inclusion, as well as looking at what we can do to improve the diversity and inclusion of those we fund.



The third and final strand of our EDI strategy aims to ensure that by **2031 all Wellcome funded research is inclusive in both its design and practice**. We often refer to this as Inclusive Research in Design and Practice (IRDP). While we know it is important to improve the diversity and inclusion of those *doing* the research, to achieve equitable health outcomes for everyone, we also need to ensure that researchers focus on *how* that research is done. This will require building diversity and inclusion into research projects from the initial design stages and carrying that through all stages of the research practice.

To achieve our strategy, we have set 2 (2023), 5 (2026) and 10 year goals (2031). This work will aim to address two deliverables as part of our 2023 goals in our strategy in relation to IRDP:

- By 2023, Wellcome has co-developed key principles of inclusive research design and practice and endorsed these for use in grant-funding and directly commissioned research.
- By 2023 Wellcome staff understand what inclusive research design and practice is and are excited by its application to Wellcome's mission and their own internal work.

There are four key challenges we need to address in order to develop IRDP principles:

1. We have limited understanding of Wellcome's knowledge and practice of IRDP, from both an individual and systematic perspective,
2. We also have limited knowledge of what others in the research funding sector are doing in relation to how (and if) IRDP is considered in funding decisions,
3. We also don't know which organisations and individuals are leading this field which makes collaborating and learning from others challenging,
4. Any new principles developed will be ineffective without the insight and knowledge from 1-3 above

We hope that through delivering this design research and development project, we will gather the insights and learning that will help us codevelop principles that will have a high chance of success once they are imbedded and implemented across Wellcome's funding.

Some concerns/risks we are aware of in relation to delivering this work include:

- People may feel they already have some knowledge about IRDP/the approach so fail to engage
- Adequate time is not planned for the research and co-development of the principles
- Staff are stretched too thin by their workloads and cannot contribute as we hope
- Other funders may feel sceptical and/or may not have the same amount of resource to overhaul and pursue this CEDI approach to funding



### **An overview of the CEDI team and our outcomes**

The Culture, Equity, Diversity, and Inclusion (CEDI) team consists of three teams, collectively working towards our CEDI goals and work to drive our organisational culture. These three teams are:

- **The Organisational CEDI team**, leading work to make Wellcome an inclusive employer
- **The Research and Funding Equity team**, leading work to make Wellcome an inclusive funder, and support Wellcome-funded research to be inclusive in both design and practice
- **Organisation Culture lead**, leading work on the discovery and establishment of organisational culture strategy at Wellcome
- **The CEDI Insights and Learning team**, developing, coordinating, and researching CEDI best practice, using this and data, monitoring and evaluation insights to inform strategic partnerships and programmes that drive CEDI goals.

### **Additional Documents**

The following additional documents will be provided once suppliers submit an expression of interest:

1. Contractual agreement (information for supplier): This document represents the draft contractual agreement terms which will be used with the successful supplier from this RFP exercise.
2. Contractual feedback sheet (to be completed by supplier): This document allows providers to provide a response to the proposed contractual agreement specifically calling out any clauses which they desire to amend.
3. Wellcome RFP Q&A (to be completed by supplier): This is your opportunity to ask questions about the RFP exercise as a whole. The Wellcome contact will collate all questions submitted, anonymise and share responses (where appropriate) to all parties within the RFP process.
4. Information governance (to be completed by supplier): Suppliers are asked to complete a Third Party Supplier Risk Assessment (TPSRA) form before the RFP submission deadline for Wellcome to assess how you handle data.



5. Wellcome's Principles (information for supplier): This document outlines Wellcome's overall principles. These principles set out how we aspire to do things and what we should expect of one another, at every level of the organisation, every day.

## RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT	Wednesday 27 April 2022
2	Submission of expression of interest to RFP	Supplier	17:00 on Tuesday 10 May
3	Submission of Supplier Q&A to Wellcome Contact	Supplier	17:00 on Friday 13 May
4	Return of Supplier Q&A to Suppliers	WT	17:00 on Monday 16 May
5	Submission of RFP Response	Supplier	17:00 on Friday 10 June
6	RFP Evaluation Period	WT	Friday 10 June to Wednesday 15 June
7	Supplier Presentations	Supplier	Thursday 23 June – Friday 24 June
8	Notification of Contract Award	WT	Monday 27 June
9	Contract Negotiation	WT & Supplier	Tuesday 28 June – Tuesday 05 July
10	Contract Start Date	WT & Supplier	Friday 08 July
11	Contract Completion Date	WT & Supplier	Monday 31 July 2023

## Response Format

The following headers support the timetable by providing further detail of the key steps.

## Expression of Interest

Suppliers are asked to submit an email confirming their intention to apply and acknowledge of the timelines set out to **Iain Millar** ([i.millar@wellcome.org](mailto:i.millar@wellcome.org)) by **17:00 on Tuesday, 10, May 2022**.

## Supplier Q&A

Prior to the submission of your RFP response, Suppliers are provided the opportunity to submit any questions they have about the exercise. All questions are to be submitted to the Wellcome Contact ([i.millar@wellcome.org](mailto:i.millar@wellcome.org)) by e-mail by **17:00 on Friday, 13 May 2022**.

## RFP Proposal



Suppliers are required to submit proposals which respond to the following sections:

- **Short proposal** outlining how you would approach this piece of work, methodology (include any foreseen risks) and why you are best placed to fulfil requirements of RFP (including examples of relevant work). **(Max 10 pages OR 20 slides).**
- **A proposed delivery plan** which will enable you to meet the deliverables and timelines outlined above. This should include details of how and when you will regularly update Wellcome on progress, and any risks associated with the timelines set out.
- **Budget of the proposed activities** costed against the requested deliverables, costed in £GBP
- **A brief outline of your approach to diversity, equity, and inclusion** in your work
- **A brief outline of how you plan to comply with GDPR and data protection legislation in your work.**

Wellcome is committed to ensuring that our RFP exercises are accessible to everyone. If you have a disability or a chronic health condition, we can offer adjustments to the response format e.g. submitting your response in an alternate format. For support during the RFP exercise, contact the Wellcome Contact. See section 15 for additional details.

Proposals should be submitted by email to **Iain Millar** ([i.millar@wellcome.org](mailto:i.millar@wellcome.org)) by **17:00 on Wednesday, 25 May 2022.**

Proposals will be assessed against the following criteria:

<b>Methodology</b>	<ul style="list-style-type: none"><li>• Coverage: How many of the desired focus areas (as outlined in the specification) will the proposed methodology address?</li><li>• Quality: Is the proposed methodology rigorous and aligned with our objectives?</li><li>• Delivering outcomes: Will the proposed methodology deliver the desired results?</li><li>• Diversity and Inclusion: Are there any diversity, equity and inclusion risks identified in the applicant's work?</li></ul>
<b>Team and experience</b>	<ul style="list-style-type: none"><li>• Skills and Experience: Does the applicant have the relevant skills, experience, and contextual understanding to deliver this work?</li><li>• EDI, perspectives and lived experience: Is there EDI experience across the team? Is there a range of perspectives across the team?</li></ul>
<b>Delivery and outputs</b>	<ul style="list-style-type: none"><li>• Communication: Is there an effective engagement and communication plan with Wellcome project team? (Wellcome staff work 2 days a week in the office)</li><li>• Delivery plan: Is the proposed delivery plan appropriate and achievable? Feasibility: How feasible is the delivery plan? Are there</li></ul>





	<p>significant risks associated with the proposed timelines, and how well are they mitigated?</p> <ul style="list-style-type: none"><li>• Sustainability: Is the approach to delivery viable and sustainable, appropriate and achievable?</li></ul>
<b>Budget</b>	<ul style="list-style-type: none"><li>• Value for Money: Is the proposed work within budget and good value for money?</li></ul>

### **About Wellcome**

Wellcome supports science to solve the urgent health challenges facing everyone.

We support discovery research into life, health and wellbeing, and we're taking on three worldwide health challenges: mental health, infectious disease and climate.

We are a politically and financially independent foundation. Find out more about Wellcome and our work: [wellcome.org](https://www.wellcome.org)

### **Non-Disclosure and Confidentiality**

Prospective Suppliers should be aware that inappropriate publicity could have a serious effect upon Wellcome's business. The information contained within this document or subsequently made available to prospective suppliers is deemed confidential and must not be disclosed without the prior written consent of Wellcome unless required by law.

### **Prospective Suppliers Personnel - IR35 and Off Payroll Working Rules**

Before the RFP response deadline, Prospective Suppliers must make the Wellcome Contact aware if they are intending to submit a proposal where the services will be provided by any individuals who are engaged by the Prospective Supplier via an intermediary i.e.

- Where the Prospective Supplier is an individual contracting through their own personal services company; or
- The Prospective Supplier is providing individuals engaged through intermediaries, for the purposes of the IR35 off-payroll working rules.

### **Independent Proposal**

By submission of a proposal, prospective Suppliers warrant that the prices in the proposal have been arrived at independently, without consultation, communication, agreement or understanding for the purpose of restricting competition, as to any matter relating to such prices, with any other potential supplier or with any competitor.

### **Funding**

For the avoidance of doubt, the output of this RFP exercise will be funded as a **Contract** and not as a Grant.



### **Costs Incurred by Prospective Suppliers**

It should be noted that this document relates to a Request for Proposal only and not a firm commitment from Wellcome to enter into a contractual agreement. In addition, Wellcome will not be held responsible for any costs associated with the production of a response to this Request for Proposal.

### **Sustainability**

Wellcome is committed to procuring sustainable, ethical and responsibly sourced materials, goods and services. This means Wellcome seeks to purchase goods and services that minimise negative and enhance positive impacts on the environment and society locally, regionally and globally. To ensure Wellcome's business is conducted ethically and sustainably, we expect our suppliers, and their supply chains, to adhere to these principles in a responsible manner.

### **Disability Confident**

The Wellcome Trust is proud to be a Disability Confident Employer (DC Level 2) and we encourage all our partners and suppliers to do the same. More information about this can be found on the government website [Disability Confident employer scheme and guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/collections/disability-confident-employer-scheme-and-guidance). Disability Confident is creating a movement of change, encouraging employers to think differently about disability and take action to improve how they recruit, retain, and develop disabled people.

### **Accessibility**

Wellcome is committed to ensuring that our RFP exercises are accessible to everyone. If you have a disability or a chronic health condition, we can offer adjustments to the response format e.g. submitting your response in an alternate format. For support during the RFP exercise, contact the Wellcome Contact.

If, within the proposed outputs of this RFP exercise, specific adjustments are required by you or your team which incur additional cost then outline them clearly within your commercial response. Wellcome is committed to evaluating all proposals fairly and will ensure any proposed adjustment costs sit outside the commercial evaluation.

### **Diversity & Inclusion**

Embracing [diversity and inclusion](#) is fundamental to delivering our mission to improve health, and we are committed to cultivating a fair and healthy environment for the people who work here and those we work with. As we learn more about barriers that disadvantage certain groups from progressing in our workplace, we will remove them.



Wellcome takes diversity and inclusion seriously, and we want to partner with suppliers who share our commitment. We may ask you questions related to D&I as part of our RFP processes.

### **Wellcome Contact Details**

The single point of contact within this RFP exercise for all communications is as indicated below:

Name: Iain Millar

Role: Graduate Trainee - Culture, Equity, Diversity & Inclusion (CEDI)

Email: [i.millar@wellcome.org](mailto:i.millar@wellcome.org)