

Trialling creative tools and methods for policy development – Request for Proposals Q&A

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Number of EOIs and proposals

1. Is there a limit on the number of applications for expressions of interest?

If you have more than one idea for a tool/method to trial, you are welcome to submit more than one expression of interest, but each **lead** organisation will be invited to submit a full proposal for a maximum of one idea. For example, if an organisation submits 3 EOIs, we will invite you to submit a full proposal for up to one of these.

2. Can we send more than one application if we are not leading the project?

If you have more than one idea for a tool/method to trial, you are welcome to submit more than one expression of interest, but each **lead** organisation will be invited to submit a full proposal for a maximum of one idea.

In addition to leading a proposal, you may also be involved as a partner organisation on other proposals, as long as the consortium of partners is different to the proposal you are leading. If more than one proposal you are involved with is shortlisted for interview, you will need to explain how you would ensure you have capacity for involvement in more than one project.

3. If we lead one proposal, can we also be a partner organisation on another proposal?

If you have more than one idea for a tool/method to trial, you are welcome to submit more than one expression of interest, but each **lead** organisation will be invited to submit a full proposal for a maximum of one idea.

In addition to leading a proposal, you may also be involved as a partner organisation on other proposals, as long as the consortium of partners is different to the proposal you are leading. If more than one proposal you are involved with is shortlisted for interview, you will need to explain how you would ensure you have capacity for involvement in more than one project.

4. Would Wellcome accept multiple EOIs from one organisation if we have 2-3 ideas that could fit the criteria?

If you have more than one idea for a tool/method to trial, you are welcome to submit more than one expression of interest, but each **lead** organisation will be invited to submit a full proposal for a maximum of one idea. For example, if an organisation submits 3 EOIs, we will invite you to submit a full proposal for up to one of these.

5. Are Wellcome open to multiple applications including the same organisation? In other words, could an organisation submit an application on their own while also be named on another application?

If you have more than one idea for a tool/method to trial, you are welcome to submit more than one expression of interest, but each **lead** organisation will be invited to submit a full proposal for a maximum of one idea.

In addition to leading a proposal, you may also be involved as a partner organisation on other proposals, as long as the consortium of partners is different to the proposal you are leading. If more than one proposal you are involved with is shortlisted for interview, you will need to explain how you would ensure you have capacity for involvement in more than one project.

6. Is it possible to submit two proposals independently from one another with a suggestion of how the two proposals could interact with each other or would you suggest submitting one joint bid?

It is difficult to advise on this without knowing the details of the proposals. At EOI stage, we suggest submitting two separate proposals and indicating how both proposals are connected. We can advise at the EOI stage on whether the proposals should be submitted as a joint bid.

Eligibility of suppliers

7. Could a national ministry be accepted as a lead institution?

Yes, we are able to accept proposals from national ministries, with the exception of countries that are the target of international sanctions.

8. Our organisation does not have a UK entity. Will that be an issue?

This is not an issue. We are happy to receive proposals from suppliers based anywhere in the world, with the exception of countries that are the target of international sanctions.

9. Could you provide clarity on the term 'supplier' – does this relate to academic teams and community partners?

We are using the term 'supplier' because that is standard practice referring to organisations that will deliver services under a Contract, rather than a Grant. However, we welcome proposals from all types of organisations, including academic teams and community partners.

10. I work part time at a university. Are there any risks of conflict of interest I need to consider?

Wellcome recognises that people may be acting in different capacities. Some guidance is available here: <https://wellcome.org/grant-funding/guidance/intellectual-property-guidance/conflicts-interest-policy-wellcome-funded-researchers-and-commercial-organisations>

11. Can a proposal contain local personnel not yet defined, for example outside a European country?

Yes, suppliers do not need to have identified all partners by the expression of interest deadline - at EOI stage, please let us know that you intend to identify a partner for your full proposal and provide a few details about the type of expertise they would bring. All partners will need to be able to participate in the selection process from full proposal stage onwards and start work from late April/early May 2023.

12. Is it possible for funding to be administered by a fiscal host on a supplier's behalf?

Wellcome's preference is to contract directly with the Supplier, but we would be happy to discuss the specific situation in more detail if we invite a full proposal.

Collaboration

13. Is a multi-supplier partnership a requirement?

No. We are happy to receive proposals from individual suppliers or multi-supplier partnerships, provided you have the mix of expertise needed to deliver the work.

14. We would like to work in partnership for this work. At EOI stage would it be OK to be tentative about this and work out the fully formed partnership if taken forward to a full proposal?

Suppliers do not need to have identified all partners by the expression of interest deadline – at EOI stage, please let us know that you intend to identify a partner for your full proposal and provide a few details about the type of expertise they would bring. All partners will need to be able to participate in the selection process from full proposal stage onwards and start work from late April/early May 2023.

Types of tools and methods

15. The brief mentions both tools and methods - is there a preference for one over the other?

We are equally interested in receiving proposals that trial creative tools or methods/approaches. The most important thing is that your proposed tool or approach is suitable for the policy question/area you are trying to address.

16. Are there any specific policy tools or methods that you would like to move away from?

We are open to any creative tool or method, provided it goes beyond or evolves tried-and-tested policy tools such as roundtables, consultations and workshops. Our Head of Policy Lab talks more about our general approach to our Policy Lab work, here: [Meet the team experimenting with creative approaches to Wellcome's policy work | News | Wellcome](#)

17. Could we propose a tool designed to be easily used/adapted for more than one of the Wellcome Trust policy areas at the same time as it specifically addresses one?

Yes. Our main objective for this work is to learn from the trials that we commission and use this to inspire more creative practice across our own policy work in future. It might be that one of the tools or methods trialled by a supplier is suitable for us to use in one (or more) areas of our policy work in future or that we can take broader lessons from the trials on what it takes to experiment (and the common challenges) and use these to inspire new ways of working/experimentation.

18. Are there any specific technologies or expertise from other sectors that you are interested in exploring in a policy context?

For this RFP, we are keeping the scope open and do not have a preference for specific technologies or expertise from other sectors. In general, we would welcome ideas that draw on expertise from other sectors if it is appropriate for the policy question/area that the proposal will address.

19. We have been considering whether to prototype a single tool, or to comparatively evaluate two tools. Do you have an approach you would prefer to see?

It is difficult to advise without knowing the specifics of the tools you have in mind. We would recommend submitting an EOI that covers evaluation of both tools, and we will provide some more specific guidance if we invite a full proposal.

20. Is it possible to propose a method that is used more as a hybrid-service-tool rather than an object-tool / digital-tool / program / recipe?

We are open to proposals where the creative method or approach is delivered by a facilitator either online or in-person (i.e. as a service) rather than a standalone tool. As with all proposals, we expect the trial itself to be run independently of the Wellcome team.

Scale and geography

21. Is there any preference for the scale at which the approach might be trialled? Would an intervention at a national/regional/local level be preferred? For example, could the project be a collaboration with just one group or would you prefer something that worked at a larger scale?

Trials can focus on tools that generate insights at a local, national or international level. The most important considerations are (1) whether the tool/method will develop robust enough insight inform policy making/policy recommendations at one of these levels; and (2) whether the tool or method – at whatever scale – could be relevant to Wellcome in future.

22. Can the focus on policy and policymakers be at a global / European or national level?

Trials can focus on tools that generate insights that inform policymaking/policy recommendations at a local, national or international level - we have not put a restriction on this.

23. Is there a preference for piloting methods across more than one geographical location?

If there is a clear rationale for this and suppliers are able to demonstrate they could deliver this, this would be in scope. However, this is not a requirement.

24. Are there any requirements, expectations or specific innovations you are keen to see regarding the scale/scalability of the tool, method or approach?

There is no specific requirement here, but scalability as well as applicability to Wellcome's work in future could be considered when describing what was learnt from the pilot.

Novelty of tool/method

25. Our approach has been developed in other policy settings. Could you clarify how you will measure projects' novelty and the extent to which they are experimental?

We will assess novelty as a tool or method that has not been trialled before in policy work or an existing tool or method that has had limited testing and/or would be evolved further through this work. Given the multiple ways creativity, novelty and experimental working is understood and defined, we would like suppliers to outline what makes their proposal creative and novel in the context in which they are working.

26. Are there rules or guidelines regarding the involvement of existing tools?

We will accept proposals of both new tools/methods and existing tools/methods that have had limited testing in policy work or will be developed further through this work.

27. At what stage of development would an ideal creative method/tool be to fit this brief? Is the intention to fund the development of *new* methods/tools, or to support *existing* tools/methods to be applied to policy insight generation?

We will accept proposals of both new tools/methods and existing tools/methods that have had limited testing/use in policy work or will be developed further through this work.

28. Could the commission build on an existing, wider initiative already in development, if there was sufficient added value and the additional work met the RFP specification?

We will consider proposals that build on an existing project as long as the supplier highlights what added value this additional work would bring and how it will meet the RFP specifications.

Subject matter

29. We have identified the broad policy area for our trial but would like to identify the specific policy issue through collaborating with communities *during* the project, rather than pre-deciding that for an EOI. Is this acceptable?

It is difficult to advise without further specific details about the proposal. However, in general terms, we recognise that co-design with stakeholders can be an important process and so we are comfortable for further refinement of the tool/method or the policy question to take place during the trial itself. However, we will need to have enough information about the broad policy area and the type of tool/method in order to make an assessment on the creativity of the tool, potential relevance to Wellcome, and whether the trial can be completed over a 6-month period. It is also worth noting that 'better understanding which policy issues in climate and health (for example) matter most to a particular community' is a valid use of a tool or method in itself. If this is your objective, then your policy question at the start will be quite broad. We will be able to give some more specific guidance in response to EOIs.

30. We believe that one of the most challenging area in knowledge transfer in the 21st Century is TRUST. Would a tool focused on this area be considered?

For this RFP, the element of the work that we are most interested in is the tool or the method that you will trial, rather than the policy content. A creative tool or method that focuses on trust and consensus building would be in scope, if it moves beyond or builds on existing tools/methods.

31. Has Wellcome examined mental health through a gender lens? Is this an area of interest to explore further?

For this RFP, the element of the work that we are most interested in is the tool or the method that you will trial, rather than the policy content. However, we'd welcome proposals in any of Wellcome's areas of focus, which includes mental health, and a creative tool or method that places a gender lens on an issue would be in scope, if it moves beyond or builds on existing tools/methods.

Intellectual property

32. Who owns the IP to any engagement format or tool used for the project? The call-out specifies (in 2.4) that policy content/ recommendations produced by the processes will be owned by the supplier. Does this also apply to any formats or tools developed to arrive at the policy content/ recommendations?

The position around ownership of IP for the deliverables of the work (which includes the tools or methods themselves) is set out under Wellcome's general terms and conditions, which are linked in section 4.4. of the RFP document.

If a supplier is unable to accept the standard position, there is an opportunity for them to detail their proposed changes to Wellcome's terms in their full proposal (4.4. Contract Feedback). Wellcome is unable to engage in lengthy negotiations of the terms and conditions for this project, so we suggest keeping proposed changes to a minimum and to points where a supplier considers changes are necessary, rather than simply a preference.

At a minimum, Wellcome needs to be able to use and adapt the tools/methods for our purposes and so it needs to be available to us, and ideally to others as well.

33. Do you have an interest in a successful tool being made fully and freely available to the public/external stakeholders?

At a minimum, Wellcome needs to be able to use and adapt the tools/methods for our purposes and so it needs to be available to us, and ideally to others as well.

The position around ownership of IP for the deliverables of the work (which includes the tools or methods themselves) is set out under Wellcome's general terms and conditions, which are linked in section 4.4. of the RFP document. If a supplier is unable to accept the standard position, there is an opportunity for them to detail their proposed changes to Wellcome's terms in their full proposal (4.4. Contract Feedback). Wellcome is unable to engage in lengthy negotiations of the terms and conditions for this project, so we suggest keeping proposed changes to a minimum and to points where a supplier considers changes are necessary, rather than simply a preference.

34. Would Wellcome be comfortable with the supplier developing a tool, with the supplier retaining the IP at the end of the project?

The position around ownership of IP for the deliverables of the work (which includes the tools or methods themselves) is as set out under Wellcome's general terms and conditions, which are linked in section 4.4. of the RFP document.

If a supplier is unable to accept the standard position, there is an opportunity for them to detail their proposed changes to Wellcome's terms in their full proposal (4.4. Contract Feedback). Wellcome is unable to engage in lengthy negotiations of the terms and conditions for this project, so we suggest keeping proposed changes to a minimum and to points where a supplier considers changes are necessary, rather than simply a preference.

At a minimum, Wellcome needs to be able to use and adapt the tools/methods for our purposes and so it needs to be available to us, and ideally to others as well.

Collaboration with Wellcome

35. Are suppliers fully responsible for organising workshops/trials of the innovative tools with stakeholders, or could these be organised in collaboration with Wellcome (and its network of contacts)?

We expect all activities associated with this work to be run by suppliers, independently of the Wellcome team. Where suppliers have significant expertise in one area of the RFP but less experience in another, we encourage suppliers to identify a partner(s) who they can collaborate with in order to meet the brief. Suppliers do not need to have identified all partners by the expression of interest deadline – at EOI stage, please let us know that you intend to identify a partner for your full proposal and provide a few details about the type of expertise they would bring.

36. Are you open to engaging Wellcome's network to assist in the generation of insights/data that could support a potential policy tool?

We will work closely with successful suppliers to ensure that their tool or method generates value and novel insights that could be used in policy development. This could include considering how Wellcome policy team networks might be helpful in making the pilot a success. However, in order to be appointed, potential suppliers will need to demonstrate that their approach or method can be run independently of the Wellcome team.

37. Could Wellcome provide access to a cohort or audience under the four focus areas (or a select focus area) or is this a requirement of the supplier?

We expect all activities associated with this work to be run by suppliers, independently of the Wellcome team. Where suppliers have significant expertise in one area of the RFP but less experience in another, we encourage suppliers to identify a partner(s) who they can collaborate with in order to meet the brief. We will work closely with successful suppliers to ensure that their tool or method generates value and novel insights that could be used in policy development. This could include considering how Wellcome policy team networks might be helpful in making the pilot a success.

38. Does Wellcome have ongoing projects in locations in other parts of the world that could be involved to serve as a testbed for a proposed creative tool/method in a controlled and planned manner?

We expect all activities associated with this work to be run by suppliers, independently of the Wellcome team and any Wellcome activity.

39. It is positive to see that Wellcome is keen to work with successful teams as partners. In addition to the collaboration during the process and Policy Lab event, do you anticipate any other opportunities to feature the projects or partners, for example through Wellcome's website or online channels, and/or would Wellcome be open to collaborating or featuring in our communications, engagement opportunities or events to discuss the project outcomes and broader programme objectives?

We anticipate that there will be opportunity to share learning of this work beyond the Policy Lab event. We're really excited about what might emerge from these pilots, and the learning for others we hope will be as equally valuable to that of Wellcome.

Use of any Wellcome communication channels is not guaranteed but any external communications would need to focus on sharing the learning from the tool or method. Promotion of individuals, organisations or the policy-specific content of the trial would not be the focus of any external communication.

40. To what degree does Wellcome work with visualizing design-processes?

It's difficult to respond without further specificity about what processes this question is referring to. Broadly though, we expect all activities associated with this work to be run by suppliers, independently of the Wellcome team. All proposals will be assessed on the basis of novelty and the extent to which it responds to the RfP requirements.

41. Is it possible to propose a flexible creative method to be placed & developed straight into policy processes at Wellcome during a planned period?

We expect all activities associated with this work to be run by suppliers, independently of the Wellcome team. This type of proposal would therefore not be considered.

[Audience/stakeholders](#)

42. Should the creative tool / method directly involve policymakers or rather generate new insights that can then be presented to policymakers?

Both of these are in scope. We are particularly interested in tools/methods that could be relevant for the Wellcome policy team in future. As a team, we will often generate insights and develop policy recommendations, which are then presented to policymakers, but there could also be scenarios where we directly involve policymakers in the process.

43. Are there additional stakeholders outside of Wellcome's policy team(s) that are outside the primary audience for the final outputs?

Wellcome's policy team is the primary audience for the final deliverables (i.e. learning from the trial and advice to Wellcome on applying lessons to our future work). However, we would also like to

share what we learn with other policy professionals interested in experimenting with more creative approaches to policy development. A secondary audience is therefore other policy professionals (particularly those who seek to influence policy) in policy teams similar to Wellcome's.

As we are interested in the tools and methods that are produced rather than the policy content, we will not be promoting or adopting any policy content/recommendations produced by these processes – these will be owned by the supplier who may take this content forward as they wish.

44. Can you clarify who the main target users of the tool/method are? Is it for researchers or for policymakers, or for either/both together?

We are particularly interested in tools/methods that could be relevant for the Wellcome policy team to use in future. As a team, we try to shape decisions made by policymakers by analysing policy issues that affect urgent health challenges and developing recommendations for change. The tools and methods that are relevant to us might also be useful for researchers and/or policymakers in their own work to develop policy recommendations/options. We are happy to receive proposals that trial a tool or method with either of these audiences if it could also be relevant for Wellcome in future.

Equity, diversity, and inclusion

45. We are a small team, so we do not have a comprehensive EDI strategy. Will this be an issue?

We would like suppliers to tell us how they will consider equity, diversity and inclusion (EDI) principles in their approach to this specific piece of work. While this may draw on aspects of an existing organisation-wide EDI strategy, we are particularly interested in how this will shape the project-specific approach (e.g. promoting inclusive and equitable ways of working; bringing in different perspectives and types of expertise).

46. Does Wellcome have a policy for remunerating research participants that can be shared?

We believe it is important to compensate participants fairly for their time and expertise and to support those who would need to take time out of paid work to engage with us. The exact nature and level of compensation is dependent on context, but we would generally expect budget for remuneration to be included as part of a full proposal. We would be happy to discuss this further with suppliers who are invited to interview/presentation.

Measures of success

47. What would success look like from a Wellcome perspective on completion of the project?

For us, the main goal of this RFP is to learn from the approaches that suppliers take and use them to inspire more creative practices in our future policy work. At the end of the project, we would like to have a better understanding of how we could embed creativity into our policy work. This includes being able to clearly explain:

- Which elements of the trial worked as expected, which did not, and why
- Whether the creative tool or method had added value over tried-and-test approaches
- Whether there are lessons that Wellcome's policy team can take forward from the trial and embed in its own work in future (it might be that one of the tools or methods trialled is suitable for us to apply to our work directly or that we can take broader lessons on what it takes to experiment and the common challenges)

We expect that not all trials will work as planned – we are comfortable with this, provided the lessons are captured and reflected upon.

48. What does a statistically significant insight look like for the Wellcome policy team? Do you have targets to determine the validity of an insight?

This is difficult to define as it will depend on context. In general, we expect suppliers to justify how the approach they are taking will lead to robust insights that inform policy (e.g. due to the number of stakeholders involved, who is represented, the assumptions that have been made in the development of a tool, etc.) We are comfortable for this to be a qualitative rather than quantitative assessment.

Long-term opportunities

49. Is the project seen as one-off or is there potential for it to evolve longer-term?

As part of our broader Policy Lab work, we are keen to build longer-term relationships with others interested in experimenting with creativity in policy work, but this project will be regarded as a one-off and will conclude at the end of the contract. Our Head of Policy Lab talks more about our general approach to our Policy Lab work, here: [Meet the team experimenting with creative approaches to Wellcome’s policy work | News | Wellcome](#)

50. Do you see this as a one-off project or do you plan to continue partnerships with chosen suppliers beyond this specific brief?

As part of our broader Policy Lab work, we are keen to build longer-term relationships with others interested in experimenting with creativity in policy work, but this project will be regarded as a one-off and will conclude at the end of the contract. Our Head of Policy Lab talks more about our general approach to our Policy Lab work, here: [Meet the team experimenting with creative approaches to Wellcome’s policy work | News | Wellcome](#)

RFP process

51. Is there space for additional questions if we were to be invited to submit a full response to the RFP after the 16th of March?

For those who we invite to submit a full response to the RFP, we are happy to follow up directly with additional questions after 16 March.

52. Please could you clarify who is subject to IR35 rules as detailed in Section 6 of the RFP document?

Standard guidance on IR35 rules is available here: <https://www.gov.uk/guidance/understanding-off-payroll-working-ir35>.