



Request for Proposal (RFP) for an embedded social researcher (or team) to support Wellcome's Institutional Research Culture Community

1. RFP Background

Wellcome is a politically and financially independent charitable foundation. We improve health for everyone by funding research, leading policy and advocacy campaigns, and building global partnerships. Wellcome's Research Environment approach cuts across [our strategy](#) and considers how we fund research. It is grounded in three values:

- The research that Wellcome supports is strengthened by being ethical, open, and engaged.
- The people Wellcome funds thrive in equitable, diverse, and supportive cultures.
- Wellcome is an innovative, efficient, and inclusive partner and organisation.

Within Research Environment, Wellcome has a Research Culture & Communities team that focuses on the second of these values: **the people Wellcome funds thrive in equitable, diverse, and supportive cultures**. This value is linked to Wellcome's recent work on research culture, including a commissioned report providing extensive evidence of the systemic culture challenges faced by research communities: [What researchers think about the culture they work in \(wellcome.org\)](#) in the UK and beyond. The associated campaign also brought together members of research communities in [townhall events](#) across the UK and featured the [Reimagine Research Culture festival](#).

Building on our values and prior work, **during 2023 Wellcome ran a scheme to provide Institutional Funding for Research Culture (IFRC)**. Of the 43 organisations that applied to this closed call, 24 were selected for funding via a combination of committee assessment and randomisation: see [The Luck of the Draw: Wellcome's ... | Wellcome Open Research](#). The projects that were funded were on a variety of research culture topics and from institutions spanning the whole of the UK and the Republic of Ireland. Each project has a duration of two years, and most will begin in the next few months.

Wellcome will convene a **community of practice**, (Wellcome's Institutional Research Culture Community) for institutional teams that **applied** to this funding - regardless of funding outcome - to share learning, insights, and progress towards addressing research culture challenges each institution has identified and is working on. Additionally, we want to enable this community to be a vehicle for driving positive research culture change at a sector level, by providing opportunities for collaboration, mutual support, coordinated action, and open sharing of knowledge and resources beyond the community.

This community, will at minimum, come together for three events over two years: a kick-off event on June 6th 2024, a mid-way event, and a final event. We expect additional smaller events for parts of the community who wish to convene e.g., around particular aims that arise within the community, research culture themes, challenges, or to bring together members with particular roles. We also anticipate creating an online presence for the community that shares information about their ongoing projects and provides contact points, without becoming a burdensome information channel for members.



Wellcome is taking a flexible approach to convening this community to ensure that this process is informed by the needs and aims of member teams. This has begun with introductory conversations with member teams ahead of the first convening, which are informing both the format of the kick-off event, and the overall shape of the community and collective vision of what success looks like. We anticipate this will continue to iterate as the community comes together.

This RFP is to seek a **supplier to be embedded as a social researcher (or research team)** within this community, and to work with Wellcome in supporting this community in line with its evolving aims. Further details are provided in the specification below.

2. Eligibility

We encourage proposals from a broad range of potential suppliers to fulfil this role of an embedded social researcher (or team). You may be an individual (operating as an individual or through their own company) or a small team. See *What are we looking for in a supplier?* in the specification below for further detail.

Please note that we cannot consider applications from prospective suppliers currently affiliated to any of the 43 organisations invited to IFRC (see *List of invited institutions* on the [scheme page](#) for a full list). This is to avoid actual or perceived conflicts of interest between institutions within the community and to allow the supplier to conduct their research and build relationships as an organisationally independent third party. This will provide the best foundation for supporting trusting and collaborative relationships within the community. **Please ensure that you have checked your eligibility in this regard before beginning your proposal.** If you are unsure, you can use the Expression of Interest and Q&A process before submitting a full proposal.

Eligible suppliers should also note that their ability to work from a position of legitimacy and trustworthiness with this community is also part of the selection criteria.

3. RFP Specification & Objectives

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. Wellcome will be guided by the supplier as to what is a reasonable budget for this activity, as we do not want to limit ambition or innovation.

Wellcome is seeking a supplier to be **embedded as a social researcher (or team)** within the Institutional Research Culture Community described above, who also supports Wellcome to shape and support this community in line with its evolving aims. The supplier would need to build a relationship with member teams, seek appropriate informed consent and buy-in from the community, and use a methodology appropriate to working with a collective, for example involving co-creation. This is with four objectives in mind:

- i. **Conducting social research on the process and experience** of community in this context, to learn about its impacts (positive and negative, intended or unintended); and



what it achieves or does not achieve for members and the wider sector. The supplier would become a member of the community, attend events, and work with Wellcome and members to co-create appropriately designed social research tracking the process, impacts, and experiences of this community.

- ii. **Bringing together and concisely capturing collective learning** across the community. This includes working with teams to identify and share emerging experiences and learning from projects being conducted across the community on “what works and does not work” to drive positive research culture change, capturing what may be generalisable and how context interacts with these findings. Note: that each funded project has its own findings and internal evaluation mechanism, but this supplier would provide a collective community-level learning and evaluation mechanism.
- iii. **Providing a feedback and evaluation mechanism** within the community so that members are enabled to give honest and reflective feedback on their experience that will be listened to and can shape the community further towards members’ needs.
- iv. **Communicating** in an open and ongoing way in relation to objectives 1-3 above, and specifically: (a) ongoing relationship-building and communications within the community to keep members up-to-date about this social research component, (b) communicating regularly with the Wellcome Research Culture & Communities team, with agreed boundaries to maintain the confidentiality of the research process and community spaces; (c) preparing learning from the community to be shared publicly for the wider sector. We expect the supplier to lead on developing communications as well as running and designing some events with us (after the kick-off event).

The four objectives above could be carried out in a range of ways. The supplier should propose an approach (see RFP **Response Format**) for each based on their expertise and experience with an expectation that they will adjust to the needs and emerging practices of the community.

Who are the member teams and organisations in this community?

Institutional teams in receipt of IFRC awards are expected to participate in the community as part of their award: see this [article](#). Teams that applied but did not receive funding have also been invited to be members of this community, and so far, nearly all have shown interest. See the [scheme page](#) for a full list of teams invited to apply. Both funded and non-funded teams are working on a range of research culture projects, and specifically identified research culture challenges in their applications. The community presents an opportunity to exchange knowledge and support beyond the organisations Wellcome was able to directly support. **The community will therefore encompass teams from up to 43 institutions** (the number that originally applied).

Who is in these institutional teams?

Each institutional team will consist of approximately 5-15 members from a wide variety of roles and backgrounds. This includes researchers from a wide variety of career stages and disciplines; individuals with different professional services and other research-enabling roles (e.g. HR, research service staff); partner organisations (e.g. other universities, training providers); and individuals bringing expertise on the lived experience of the specific research



culture challenges being addressed. Funded teams - and optionally non-funded teams - include the organisation's Vice-Chancellor or equivalent with high-level responsibility for research at the organisation to position the projects for cross-organisational impact. This particularly wide range of roles and perspectives presents both an opportunity and challenge for community convening.

What are we looking for in a supplier?

The supplier can be an individual (operating as an individual or through their own company), or a small team. We are looking for a supplier:

- **With a social research or equivalent expertise and skillset** suitable for conducting research within a community, in a way that appropriately seeks consent, buy-in, and involvement from community members. For example, as a supplier, you may have a skillset suited to ethnography, participant observation, interviewing and co-creation, but we are open to a range of equivalent backgrounds. You should be able to demonstrate experience and understanding of the challenges and ethical considerations of being an embedded researcher. You should have qualitative analytical skills appropriate for bringing together and concisely capturing learning across multiple projects and community interactions. Communication skills for varied audiences and audience sizes are also important.
- With the ability to work from a **position of legitimacy and trustworthiness** when building relationships, conducting research, and receiving honest feedback from this community. Please check the institutions that are likely members of this community (see: [The Luck of the Draw: Wellcome's ... | Wellcome Open Research](#) and List of Invited Institutions [here](#)) to reflect on whether and how you would bring legitimacy and trustworthiness to these relationships and a range of roles within each team. **Please check your eligibility to submit a proposal specified in Section 2.**
- Who is inclusive and diverse (if multiple individuals are involved), and considers **equity, diversity, inclusion**, and a positive culture in their own work context.
- Who is **able to attend community events and conduct social research in-person** and online in a UK, Republic of Ireland and potentially international context (for grants who include international collaborators), and potentially visit institutions across these geographies over the course of the 2.5-year role. There will be a minimum of three Wellcome-convened events (beginning with a kick-off on June 6th, 2024 in Wellcome's London office). We anticipate additional smaller events focused on e.g. theme or role, arising organically from community members' collaborations or convened by Wellcome in response to community interest. Where practically reasonable and appropriate to the event, the supplier should seek consent to participate in these additional events as part of their role. The community may have an online platform that the supplier should participate in where appropriate.
- Who (ideally) is **familiar with the importance and breadth of research culture** as an area of challenge and endeavour for academic institutions and is keen to help cultivate a positive and inclusive culture within this community.
- Who (ideally) has **experience of convening or working with communities in an academic institutional context**, with an awareness of the wide range of roles and career stages that are part of research and research-enabling communities.



- Who (ideally) has **experience of facilitating group discussions** and promoting diverse contributions, meaningful conversation, and psychological safety. We do not expect the supplier to take on a facilitation role at events if this conflicts with participant-observation or co-creation activities. However, prospective suppliers are welcome to propose methodologies in which facilitation is part of their role.

Deliverables and project timeline

We are seeking to contract a supplier for 2.5 years with the possibility of extension, covering the duration of most funded IFRC projects and six months of additional evaluation and reporting time. The expected project timeline and deliverables are to guide your proposal.

Project timeline:

Expected contract start date	1 st May 2024
First meeting with Wellcome team meeting to discuss supplier's proposed approach before kick-off event	May 2024
Kick-off event (supplier attends and actively participates in a way mutually agreed with Wellcome team: could involve e.g. acting as a "discussant" synthesising themes from talks or break-out sessions to provide reflections back to the community at end of day)	6 th June 2024
Activities towards objectives/deliverables including: involvement in additional events; ongoing research relationship-building, research and communications with community; analysis; reporting to Wellcome; external communications.	June 2024 – October 2026
Mid-way event	approx. May 2025
Final event	approx. May 2026
Draft of final report to Wellcome	approx. September 2026
Final report to Wellcome	October 2026

Deliverables:

- #1 – The supplier meets regularly with Wellcome to discuss the community, event planning, and supplier's approach, progress, and insights.
- #2 – The supplier produces written update reports for Wellcome at agreed intervals and in agreed formats. These should reflect the supplier's progress and reflections on objectives 1-4, including emerging research findings and self-reflections on the supplier's and Wellcome's role in community convening.
- #3* – The supplier attends and actively participates in the full-day kick-off, mid-way and final events convened by Wellcome and additional events emerging from this community as is practically reasonable and appropriate. We estimate this may involve around 5-10 additional events that may be online, hybrid or in-person and distributed across the UK and Republic of Ireland.
- #4* – We suggest that supplier conducts relationship-building and research through interactions with each of the up to 43 institutional teams outside of community events,



as this may be necessary to build trust; a breadth, depth, and diversity of inputs into the supplier’s research; and a feedback and communication mechanism (as per the four objectives). This may involve online meetings, in-person visits, and/or other activities with teams, aligning with the supplier’s proposed methodology. *The supplier may remove or change this deliverable according to their proposed methodology and what they consider to be realistic best practice.*

- #5 – The supplier interacts with any online platform developed for the community, in a way that is considered appropriate by them, Wellcome and the community.
- #6 – The supplier develops and carries out a communication strategy for keeping the community up-to-date and involved with their activities, for example, via a newsletter or an online community platform if/when this is in place. This should be designed to minimise the burden on community members while promoting openness, trust and a sense of belonging.
- #7 – The supplier develops a communication strategy for open access sharing of shared community findings (primarily emerging from Objective 2) for the wider research sector and any audiences interested in research culture. If considered appropriate by the community, this should involve sharing emerging findings, reflections and best practice in an ongoing way rather than sharing only final outcomes. This aims to keep the community’s activities as open as possible to the wider sector, given that research culture is a collective endeavour, and this community could not include all UK, Republic of Ireland, or international organisations who would be interested.
- #8 – The supplier delivers a final report and accompanying slide deck to Wellcome using relevant brand guidelines, made available under the Creative Commons Attribution licence (CC-BY).

*We recommend the supplier budgets event attendance and associated preparation and analysis time for **a minimum of 8 in-person community events around the UK and Republic of Ireland and an additional 5 online community events**. Additionally, include a budget for any interactions with teams that you expect beyond the events, such as online meetings and visits. If the supplier wishes to attend or organise further events to strengthen their research and support of the community, this can be discussed and supported on a per-case basis with Wellcome during the course of the contract. Please ensure costs for additional events are clearly stated under Question 7 in the RFP response.

Suppliers based outside the UK and Republic of Ireland can include international travel, and this should be clear in the budget breakdown.

4. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issued to suppliers on Contract Opportunities webpage	Wellcome	13 December 2023
2	Deadline for Submission of Expression of Interest and Supplier Q&A	Supplier	15 January 2024



#	Activity	Responsibility	Date
3	Return of Supplier Q&A to Suppliers	Wellcome	24 January 2024
4	Deadline for Submission of RFP Response (in line with the requirements set out in section 5 below)	Supplier	7 February 2024
5	RFP Evaluation Period	Wellcome	8 February – 19 February 2024
6	Supplier Presentations	Supplier	1 March 2024 to 14 March 2024
7	Notification of Contract Award	Wellcome	March 2024
8	Contract Negotiation	Wellcome & Supplier	March- April 2024
9	Contract Start Date	Wellcome & Supplier	Early May 2024

5. Response Format

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

Expression of Interest and Supplier Q&A

Prospective suppliers may submit a short expression of interest by e-mail to the Wellcome contact in accordance with the RFP timetable, which should contain the following information.

- Confirm whether you are an organisation or an individual (applying as an individual or through your own company).
- If an organisation, please provide a registered name, address, and registration number.
- A non-binding cost estimate as a single figure in GBP.
- Any questions you have about the exercise and activity.

Prior to the submission of your full proposal to the RFP, Suppliers are provided the opportunity to submit any questions they have about the exercise and the activity. All questions will be collated, anonymised, answered, and returned to all Suppliers who have submitted an expression of interest in the RFP process. Please make sure you ask all questions at this stage. Once Wellcome have responded to all questions, if you have any additional questions after this deadline, these will not be answered to ensure that this is a fair and equitable process.

Submitting an expression of interest or question is not a binding commitment to submit a full proposal should your organisational priorities change, you will not then be penalised for future



opportunities. Prospective suppliers who have not submitted an expression of interest can still apply with a full proposal.

RFP Response

Suppliers submitting a full proposal should cover the following areas in their response:

#	Question	Max words
1	<p>Outline how you will approach this piece of work (including proposed methodology, research questions and ethical considerations) to meet the four objectives identified in the <i>RFP Specification & Objectives</i>:</p> <ul style="list-style-type: none"> • Conducting social research on the process, experience and impacts of community in this context. • Bringing together and concisely capturing collective learning that takes place across the community. • Providing a feedback and evaluation mechanism within the community. • Communicating in an open and ongoing way in relation to objectives 1-3 above. 	750 words
2	<p>Describe the individual or team proposing to do this work, their relevant skills and experience, and proposed approach to fostering a safe, positive and inclusive culture when interacting with this community (and your supplier team if relevant). See <i>“What are we looking for in a supplier?”</i> Key prompts:</p> <ul style="list-style-type: none"> • Why are you best placed to do this work? • Illustrate this with one case study of your past work. • When fostering a safe, positive and inclusive culture: anticipate your positionality in relation to the diverse dimensions of this community (including demographic/intersectional identities, roles and seniority, and geographies within UK and Republic of Ireland). 	400 words
3	<p>Explain why you believe you can work from a position of legitimacy and trustworthiness with this particular community of institutional teams, and how you will go about building trust and trustworthiness in this context.</p>	200 words
4	<p>Outline the main challenge(s) and operational risks you foresee with this work and your plan for overcoming or mitigating these. This includes challenges related to the four objectives as well as risks affecting your (or your team’s) capacity to meet timelines and complete deliverables.</p>	300 words



5	What would be your approach to working with the Wellcome Research Culture & Communities team during this project? How regularly would you propose meeting with Wellcome and reporting progress?	250 words
6	Provide a proposed delivery plan outlining the project deliverables and timelines.	250 words
7	**Provide a detailed budget including breakdown justifying the proposed costs to meet Wellcome's requirements, including a total per annum (2024, 2025, 2026) and a total cost.	N/A

** Please include a minimum of 8 in-person community events that may be distributed around the UK and Republic of Ireland according to evolving needs of the community, and an additional 5 online community events. Please ensure costs for any additional events, such as online meetings and visits are clearly stated in the breakdown.

Evaluation Criteria

During the RFP evaluation period the evaluation panel will independently evaluate your proposal against the criteria outlined below. All scores will be collated, discussed and a decision will be agreed on who progresses to the next stage of the procurement exercise.

Criteria	Detail	%
Methodology	<i>Coverage:</i> How well are the desired focus areas (as outlined in the specification) covered in the proposed methodology? <i>Quality and ethical approach:</i> Is the proposed methodology aligned with our needs and values? <i>Utility:</i> Will the proposed methodology deliver the desired, credible, and useful results?	25%
Experience	<i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work? <i>Legitimacy and trustworthiness:</i> Will the supplier have legitimacy and be trustworthy to institutional teams across this community?	25%
Delivery & Outputs	<i>Communication:</i> Is there a good plan for communicating with the Wellcome team, community, and externally? <i>Delivery plan:</i> Is the proposed delivery plan appropriate and achievable? <i>Feasibility:</i> How feasible is the delivery plan? Is there a good plan for overcoming the identified challenges and operational risks?	25%
Budget	<i>Value for Money:</i> Is the proposed work within your budget and good value for money?	10%
Culture	Has the supplier clearly described how they will promote a <i>safe, positive and inclusive culture</i> both within their team (if applicable) and/or when interacting and researching within this community?	15%



Total:	100%
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Contract Feedback

This section allows Suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. This is the suppliers' opportunity to provide negotiation points on Wellcome's terms and conditions.

Clause #	Issue	Proposed Solution/Comment

Suppliers submitting proposals as a registered company should review Wellcome's Standard Terms and Conditions [document](#).

Individuals submitting proposals as a sole trader (not registered) should review this [document](#).

Individuals submitting proposals through their own personal services company please highlight this to the Wellcome contact immediately (see point 7. below).

Information Governance

Wellcome is committed to upholding data protection principles and protecting your information. The [Wellcome-Privacy-Statement-2023.pdf](#) explains how, and on what legal basis, we collect, store, and use personal information about you. This includes any information you provide in relation to this proposal.

Under [GDPR/Data Protection law](#), Wellcome must keep a record of all personal information it is processing (i.e., collecting, using, and sharing). This record will be made available to the Information Commissioner's Office upon request.

This is Wellcome's record of data processing activities which meets GDPR article 30 requirements.

Suppliers will be asked to complete the [TPSRA2](#) assessment before presentation stage to assess how you handle data.

Supplier Presentations

Following a submission of the proposal successful supplier proposals will be invited to a virtual meeting which will last 50 minutes in total and will be a PowerPoint presentation by the Supplier followed by questions and answers session.



6. About Wellcome

Wellcome improves health for everyone by funding research, leading policy and advocacy campaigns, and building global partnerships. Collaborative research that involves a diverse range of people from different fields of interest is key to progress in health science – and to achieving our aim of fostering a healthier, happier, world. We are taking on the biggest health challenges facing humanity – climate and health, infectious disease, and mental health – to find urgent solutions and accelerate preventions. Find out more about Wellcome and our work at: [wellcome.org](https://www.wellcome.org).

7. Prospective Suppliers Personnel - IR35 and Off Payroll Working Rules

Before the RFP response deadline, Prospective Suppliers must make the Wellcome Contact aware if they intend 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.

8. Equity Diversity and 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. We want to cultivate an inclusive and diverse culture, and 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.

9. 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/guidance/disability-confident-employer-scheme). 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.



10. 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.

11. 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.

12. Funding

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

13. 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.

14. 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.



15. Wellcome Contact Details

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

Name: Hardip Dhaliwal
Pronouns: She/ Her
Role: Procurement Officer
Email: RFP@wellcome.org