



## Request for Proposal (RFP) for Engaged Research Tools Assessment

### 1. RFP Background & Objectives

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.

To support these ambitions, we encourage our researchers to use an [engaged approach](#). An engaged research approach describes a variety of methodologies, frameworks, and skills that embed a range of voices and experiences across the lifecycle of research.

Engaging with stakeholders as early as possible helps researchers understand what might be required from their research and enables them to plan, cost and staff their proposals appropriately. Engagement can be across a range of stakeholders. Stakeholders can include:

- **the public** (for example, general public, lay perspectives, under-served groups)
- **the community** (for example, community groups, community advocates, patient and carer groups, members living in geographic areas where research will be conducted)
- **policymakers** (for example, policy groups, advocacy groups, advisory committees or bodies)
- **researchers** (for example, people using similar methodologies in different fields, people researching the same topic but with different disciplinary, methodological orientations or key networks)
- **intermediaries** – people who might be best placed to facilitate connections between your research and other stakeholder groups to foster greater understanding, participation, and longer-term uptake and impact (for example, clinicians, cross-sector representatives)

This RFP seeks a supplier to produce a landscaping report that focuses on the tools needed to help our researchers embed engagement in Wellcome-funded research and the barriers and challenges that researchers currently face in undertaking this work.

### 2. RFP Specification

This section sets out the specification of goods 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 limit ambition or innovation.



Wellcome seeks a supplier to produce a landscaping report that focuses on the tools needed to help our researchers embed engagement in Wellcome-funded research and the barriers that researchers currently face to undertake this work.

All our content should be WCAG 2.2. AAA compliant. Any documents being provided to Wellcome must pass accessibility requirements. An example of an accessible document you've produced must be provided in your response to the RFP. If you are unable to produce accessible documents, budget must be set aside to employ a suitable agency to do this work.

The landscaping report has four objectives in mind:

- i. scope the field for available toolkits, guidance, and best practices for engaged research approaches with the following key stakeholders; public, community, policy, research, clinicians, cross-sector representatives.
- ii. Outline key methodologies, frameworks and approach's that are used for engagement activities for example, co-production, user experience, user centred design, co-development, shared power dynamics, decision making.
- iii. Delineate how the above can be leveraged by:
  - a. Researchers based on career stage (early, mid, established).
  - b. Researchers based on disciplinary focus. [Wellcome's discovery mode](#) funding covers a range of research areas, and the landscaping report should focus on information that can assist our potential applicants across these fields;
    - fundamental processes that underpin biology, to understand more about how human life works.
    - complexities of human health and disease, including clinical and population-based approaches.
    - burden of disease and its determinants, where this brings new and transformational knowledge.
    - development of methodologies, conceptual frameworks, technologies, tools or techniques that could benefit health-related research.
    - needs, values and priorities of the people and communities affected by disease and health disparities.
    - social, ethical, cultural, political, economic and historical contexts of human health and disease.
  - c. Research lifecycle stages, for example idea generation, research planning and design, implementation, monitoring and evaluation, dissemination.
- iv. Collate the resources outlined in the previous steps in a user-friendly repository. These resources could then be shared with our researchers and internally with Wellcome if needed. This repository will need to reflect the different areas of entry into engaged research e.g. career stage, discipline, lifecycle.

The four objectives above could be carried out in a range of ways. The supplier should propose an approach (see 'Section 4. Response Format' within this RFP below) 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 is the audience?*

This landscaping report is primarily for internal use for the Research Environment team. However, we envision using the information provided to better support researchers who are considering applying for Wellcome funding through our [guidance page](#). Therefore, what value each of these resources present to our researchers across disciplines and career stages will be an essential element to communicate. We encourage suppliers to state if they plan to publish this report in any external repositories once sign of is received ([Open Research Platform](#), [MESH](#))

*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 background in using engaged methods in their research and/or an engagement professional and/or equivalent expertise and skillset. This skillset would enable the supplier to outline their methods/approach to this project. The resources could be far reaching and will need a creative approach to undertaking this work.
- With experience of communicating (both written and oral) complex issues that intersect and overlap at different points.
- Whose team is inclusive and diverse (if multiple individuals are involved), and considers equity, diversity, inclusion, and a positive culture in their own work context.
- Can provide two case studies about your past work.

**3. RFP Timetable**

| # | Activity   | Responsibility      | Date                           |
|---|--|---------------------|--------------------------------|
| 1 | RFP issued on <a href="#">Contract Opportunities</a> webpage | Wellcome            | 05 February 2024               |
| 2 | Submission of Expression of Interest and Supplier Q&A        | Supplier            | 04 March 2024                  |
| 3 | Return of Supplier Q&A to Suppliers                          | Wellcome            | 15 March 2024                  |
| 4 | Submission of RFP Response                                   | Supplier            | 27 March 2024                  |
| 5 | RFP Evaluation Period  | Wellcome            | 28 March 2024 to 10 April 2024 |
| 6 | Supplier Presentations                                       | Supplier            | w/c 22 April 2024              |
| 7 | Notification of Contract Award                               | Wellcome            | April 2024                     |
| 8 | Contract Negotiation   | Wellcome & Supplier | April – May 2024               |



| # | Activity            | Responsibility      | Date            |
|---|---------------------|---------------------|-----------------|
| 9 | Contract Start Date | Wellcome & Supplier | Early June 2024 |

#### 4. Response Format

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

##### Expression of Interest and Supplier Q&A

Suppliers are asked to 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.

- Confirming whether you are an organisation or individual
- If an organisation please provide 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 EOI/Q&A is not a binding commitment to submit a full proposal should your organisational priorities change, you will not then be penalised for future opportunities.

Please note, if we have an overwhelming response, we may choose to use this EOI stage as a selective phase, this is at Wellcome's discretion.

##### RFP Response

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

| # | Question  | Max Word  |
|---|---|-----------|
| 1 | The proposal should demonstrate a clear understanding of the RFP objectives. Please outline how you will approach this piece of work (e.g. proposed methodology, research questions and ethical considerations) to meet the four objectives identified in the <i>RFP Specification</i> section: <ol style="list-style-type: none"> <li>i. Scoping the field for available toolkits, guidance and best practice for engagement in research with a range of stakeholders.</li> <li>ii. Outlining key methodologies, frameworks and approaches.</li> </ol> | 750 words |



| # | Question  | Max Word    |
|---|---|-------------|
|   | iii. Delineating how to use these across disciplines, career stage and research lifecycle.<br>iv. Communication of available resources and their locations.   |             |
| 2 | Describe the individual or team proposing to do this work, their relevant skills and experience. See <i>“What are we looking for in a supplier?”</i> Key prompts: <ul style="list-style-type: none"> <li>• Why are you best placed to do this work?</li> <li>• How have you worked at the interface of research and engagement previously?</li> <li>• Illustrate this with two case studies of your past work.</li> </ul>                         | 500 words   |
| 3 | 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.   | 300 words   |
| 4 | How would you ensure equity, diversity and inclusion considerations are embedded throughout the planning, development and delivery of the project?  | 300 words   |
| 5 | Provide a proposed delivery plan outlining the project deliverables and timelines as well as how your approach to working with the lead contact throughout this project.  | 300 words   |
| 6 | Provide your cost proposal for each phase based upon the requirements set out within this procurement exercise setting out; <ol style="list-style-type: none"> <li>i. Cost breakdown (excluding VAT or any local taxes including all costs specifying all day rates of individuals involved, the allocation of days between members of the team, and the cost of activities).</li> <li>ii. Supporting justification of the financials.</li> </ol> | NA<br>Table |
| 7 | All our content should be WCAG 2.2. AAA compliant. Any documents being provided to Wellcome must pass accessibility requirements.<br>An example of an accessible document you’ve produced must be provided in your response to the RFP. If you are unable to produce accessible documents, budget must be set aside to employ a suitable agency to do this work.  | NA<br>Table |



## Evaluation Criteria

| Criteria           | Detail  | %           |
|--------------------|---|-------------|
| Methodology        | <p><i>Coverage:</i> How well are the desired focus areas (as outlined in the specification) covered in the proposed methodology address?</p> <p><i>Quality:</i> Is the proposed methodology aligned with our needs?</p> <p><i>Utility:</i> Will the proposed methodology deliver the desired, credible, and useful results?</p>                       | 30%         |
| Experience         | <p><i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?</p>   | 30%         |
| Delivery & Outputs | <p><i>Communication:</i> Is there a good plan for communicating with the Wellcome team?</p> <p><i>Delivery plan:</i> Is the proposed delivery plan appropriate and achievable?</p> <p><i>Feasibility:</i> How feasible is the delivery plan? Are there significant risks associated with the proposed timelines, and how well are they mitigated?</p> | 30%         |
| Budget             | <p><i>Value for Money:</i> Is the proposed work within your budget and good value for money?</p>  | 5%          |
| EDI                | <p><i>Do they have EDI policies and are these being put into practice in the proposal?</i></p>  | 5%          |
| <b>Total:</b>      |   | <b>100%</b> |

## 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, we will not consider negotiations that are only raised after the contract has been awarded so as not to delay the contracting process. Please ensure you engage with a relevant legal contact if applicable. Contract feedback is to be incorporated into your proposal as an annex and in the following format;

| 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 6 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 proposals will be invited to a virtual meeting which will last 50 minutes in total and will be a PowerPoint presentation followed by questions and answers session.

## **5. 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're 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://wellcome.org).

## **6. 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.

## **7. 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.

### **8. 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/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.

### **9. 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.

### **10. 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.

### **11. Funding**

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

### **12. 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.

### **13. 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.

#### **14. Wellcome Contact Details**

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

Name: Rebecca Giles  
Pronouns: She/her  
Role: Procurement Officer  
Email: RFP@Wellcome.org