QUESTIONS AND ANSWERS

Request for Proposal (RFP): Engaged Research Tools Assessment

#	Supplier Question	Wellcome response
1.	**File Format:** The RFP requires that the resources are collated in a user-friendly repository - what **file format** do you have in mind? Would these be Word documents?	Wellcome anticipates that the document format will be either Word Document or PDF, and the most important aspect will be that it meets the accessibility requirements. 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 as outlined in the RFP. Please note that documents, such as PDFs, must be tagged, have a logical reading order assigned, be bookmarked, include suitable alt-text for any images, have the default language set and meet colour contrast standards. A thorough review for accessibility of the document must take place before delivery to Wellcome. This review must be done in accordance with best industry practice, which may include, but shall not be limited to checks through keyboard-only manual testing and screen reader manual testing (for example VoiceOver on Mac). • *WCAG PDF accessibility guidance: https://www.w3.org/TR/WCAG20-TECHS/pdf* • *Adobe accessibility check guidance: https://helpx.adobe.com/acrobat/using/create-verify-pdf-accessibility.html*

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		Templates and brand guidance can be found on the Wellcome Brand Book: https://brand.wellcome.org/d/pnL18cW1oLsC/wellcome-brand-book#/reports-c98/creating-reports-for-wellcome-p366 If you are unable to produce accessible documents, budget must be set aside to employ a suitable agency to do this work.
2.	**Delivery repository format:** The RFP refers alternately to the final deliverable as "a user-friendly repository" and a "report". A repository suggests, for example, an interactive digital library that could be embedded in the Wellcome website or housed on a platform such as MESH. A report is more likely to be a single interactive document that can be shared as an attachment and downloaded from the website. These two options demand different skills. Could you please clarify which type of product you envisage? ….	The key output of this RFP will be a landscaping report that meets the three core objectives outlined. • In terms of the user-friendly repository, the expectation for this objective is that all resources mentioned/highlighted in the landscaping report or any reviewed throughout this project will be shared as part of the process. This could include an annotated bibliography grouped into the disciplinary themes and career stages. • The report itself would serve as the repository. We are open to suggestions on how you think providing and outlining the resources would be most helpful. This will be part of the landscaping report and will help researchers considering applying to Wellcome understand the resources available to them to engage with key stakeholders.
3.	…. The RFP states the key deliverable(s) as a landscaping report and a user-friendly repository: Are the landscaping report and the user-friendly repository - one and the same? Or does Wellcome a) require only the landscaping report (with the appropriate use of framing/categorisation for Wellcome to set up the repository then?) or b) two outputs (the report and the repository)?	Please see the answer to previous question. In terms of the user-friendly repository, the expectation for this objective is that all resources mentioned/highlighted in the landscaping report or any reviewed throughout this project will be shared as part of the process. This could include an annotated bibliography grouped into the disciplinary themes and career stages. We are open to suggestions on how you think providing and outlining the resources would be most helpful. This will be part of the

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	and if the latter – is the repository for staff, external users or both? And if so - is the contractor required to develop/design the interface for engagement with the repository? Given the wealth of tools and resources available in certain areas and the overlap between some, do Wellcome require a landscape report that is selective or comprehensive regarding the tools included?	landscaping report and will help researchers considering applying to Wellcome understand the resources available to them to engage with key stakeholders. The shared resources will be for both Wellcome staff and external users. Wellcome will share the outcomes of the report through the most appropriate channels ensuring that authorship is cited. The contractor will not be required to develop/design the interface. We envision the landscaping report to be selective of best practices in the field, and in spaces where there are limited tools (e.g. discipline-specific limitations) we would expect what is available to be shared and summarised.
4.	**Timeframe:** Can you confirm if there is a required time for the repository to be available online? What is the envisaged end date of the contract? Is there a deadline by which the work should be completed? Are there any other key dates by which specific milestones need to have been completed? What are the expected timelines for delivery of the research project? What are the key timelines and milestones for delivery of the RFP? What is the timeline that this exercise looks at? What is the anticipated timeline for the research project, including key milestones? What is the anticipated scale of dissemination activities of outputs?	Wellcome would expect the resources to be shared with the final landscaping report, as there will not be a need to design or create an interface. Wellcome will be guided by the supplier as to what the most suitable timeline for this RFP would be. However, we would encourage the supplier to think about how they plan to undertake this work and what this would look like in terms of timelines. We would anticipate that the supplier outlines the milestones and build these into the project plan, linked to the deliverables suggested. We are open to suppliers outlining what would work best for them. The landscaping report is expected to be added to an open repository such as Open Research to enable easier sharing of the report. Wellcome is open to what open repository you are using, but we would expect it to be named in the proposal. The supplier will be responsible for disseminating the outputs.

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	Is there a timeline that Wellcome has in mind as we have assumed it to be 6 months, but we understand that the usability and customisation of the repository may take a little time? What is the expected timeline for completion of this assignment?	
5.	**Barriers and challenges:** The RFP introduces the landscaping report (p. 1 of the RFP) as needing to: "focus 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". However, in the four detailed objectives outlined for the landscaping report on p. 2 the barriers are not mentioned under any of the four bullet points. Could you please clarify what the focus of the landscaping report be when it comes to current barriers and challenges? Should they be included under one of the four bullet points and if so which one? Should they be included separately or as part of a scene setting piece? How much weight should be given to the barriers and challenges compared to the other objectives? Given the objective to identify tools that can embed cross-sectoral stakeholder engagement within Wellcome funded research and overcome barriers, would it be possible to share the existing challenges to such approaches that have been identified so far, within existing research?	The landscaping report will be primarily focused on the tools available to researchers. Wellcome anticipates that during the research on the landscaping report, barriers and challenges to how researchers can use these would be frequent and form an essential part of the report's narrative. Wellcome will not be able to share existing research on this point. Wellcome is open to the barriers and challenges being integrated into the landscaping report at the supplier's discretion as long as it has been considered. This could entail including it as a bullet point or as a core part of the scene-setting piece. Wellcome anticipates that this will form part of the proposed methodology or approach to undertaking this work and may be part of the research questions. Therefore, it will be assessed as part of the 30% outlined on the criteria.
6.	**Objectives & deliverables:** **Objectives (i) and (ii)** in the RFP seem to be closely related as toolkits, guidance and best practice are likely to relate to specific methodologies, frameworks and approaches. Do you see these as separate objectives? If so, could you please clarify how they differ?	The landscaping report should focus on what is currently available to researchers who want to undertake engagement. While the output of this report will be used to support researchers looking to apply to Wellcome, it is not dependent on any Wellcome data or any explicit Wellcome experiences.

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	Is objective (ii) regarding methodologies, frameworks and approaches about what is **available** "in the world" (similar to objective (i)) or about what Wellcome researchers are **currently using**? To what extent should the repository structure be linked to the review of methods, frameworks and approaches? (for example, when highlighting resources appropriate to career stage, disciplinary focus and research lifecycle stage) In addition to the repository, are there any other anticipated or desirable deliverables, such as a slide deck summary or report of key findings of the first three objectives, and/or a webinar or other dissemination event? Is the expectation that the final repository will be available to Wellcome researchers and a wider audience of researchers and partners? Is there resource to disseminate and engage users with the final outputs of the RFP? Is the repository mainly intended for UK-based researchers, or for all Wellcome Trust funded researchers globally? We understand the customisation will be required for the users of the repository so does Wellcome have any more details on the various users and their intended use of the repository?	The landscaping report is expected to be added to an open repository such as Open Research to enable easier report sharing. Wellcome is open to what open repository you use, but we would expect it to be named in the proposal. Wellcome understands that the cross-disciplinary nature of engagement means there will be many ways to approach this work. We anticipate the key difference will be the type of resource outlined. For example, toolkits and guidance might be discrete one-off products, whereas methodologies and frameworks could be relevant for a particular discipline. The collated resources should be able to be categorised by the career stage and disciplinary focus. These will overlap, so it will be essential to highlight when that is the case. A slide deck summary is anticipated to accompany the landscaping report. Wellcome would be open to including dissemination events in any proposal. In terms of the user-friendly repository, the expectation for this objective is that all resources mentioned/highlighted in the landscaping report or any reviewed throughout this project will be shared as part of the process. This could include an annotated bibliography grouped into the disciplinary themes and career stages. We are open to suggestions on how you think providing and outlining the resources would be most helpful. This will be part of the landscaping report and will help researchers considering applying to Wellcome understand the resources available to them to engage with key stakeholders.
7.	**Aim:**	The problem that Wellcome aims to overcome is the disparate nature of tools, guidance, etc., within the engagement space. This means

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	How does Wellcome frame this piece of work in terms of 'the problem' you aim to overcome?	that you must have the knowledge of where to look to find them. The landscaping report hopes to pull together what's currently in the field and use it to provide guidance to applicants so that as they plan their proposal, they have access to the resources needed to do this well.
8.	**Research Contacts:** For any consultation with Wellcome researchers, is Wellcome able to recruit consultees from its existing list of contacts? If yes: A. Would this include (a) researchers who have been successful in securing Wellcome funding as well as (b) those who have applied for Wellcome funding in the past but were unsuccessful? B. How many lead applicants have been successful in securing Wellcome funding in 2023? In 2022? In 2021? C. How many lead applicants have been unsuccessful in securing Wellcome funding in 2023? In 2022? In 2021? Should we be successful, is it feasible for Wellcome to share contact details for previous successful or unsuccessful applicants. If not would Wellcome be able to share a survey with those applicants? Would the chosen supplier get access to Wellcome Trust project/proposal data?	The output of this report will be used to support researchers looking to apply to Wellcome, but it is not dependent on any Wellcome data or any explicit Wellcome experiences. Therefore, Wellcome would not share any data about the people that it has funded. This landscaping report should focus on the experience of health researchers who want to undertake this work, even if they are not applying to Wellcome.
9.	**Remit:** Should delivery of the work within the RFP focus on Wellcome's priority research areas? Will Wellcome consider it useful to refer to resources and learning from outside health research?	The focus of the project should be to review existing resources (as outlined in objectives I and II) that will help researchers embed engagement into their research and the barriers that they face to do this work. The output of this report will be used to support researchers

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	Should the scoping of toolkits, guidance, and best practices for engaged research approaches be limited to resources that align with Wellcome's Discovery Mode – or are you open to resources from further afield that may have the potential to be adapted?	looking to apply to Wellcome, but it is not dependent on any Wellcome data or any explicit Wellcome experiences.
		The report should focus on the four objectives outlined in the RFP. Wellcome is open to understanding what resources are available outside of health research to undertake engagement. However, it will be essential to outline why these resources were considered and what value added they would bring into the health research space if used.
	To what extent do you want the supplier to evaluate the toolkits, guidance and best practices, for example in terms of quality, EDI or relevance to the contexts their researchers will be working in (similar to the proposed approach for evaluating methods, frameworks and approaches)?	
	Is there any expectation that the supplier should synthesise key insights from toolkits, guidance and best practices, to avoid duplication, add value and make the material more accessible to busy researchers?	Wellcome expects the supplier to evaluate the resources provided, the focus should be on if it enables the researchers to better embed different voices and perspectives into their research and this is likely to encompass EDI and the disciplinary context. Wellcome is open to understanding what the supplier things would be other key evaluation themes.
	We note that the RFP focuses on a desk review of resources. Would key informant interviews be outside of the scope of the methods for this work?	Key informant interviews would not be outside of the scopes of this project, but any proposal should outline how they will undertake this work and how it will support the overall objective of the landscaping report.
	The RFP states, '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'. The RFP also states that work should 'scope the field for available toolkits, guidance, and best practices.' Is the primary focus of this work to assess the needs of Wellcome researchers or to identify existing resources, as this will have a significant impact on the methodological approach taken?	In terms of the user-friendly repository, the expectation for this objective is that all resources mentioned/highlighted in the landscaping report or any reviewed throughout this project will be shared as part of the process. This could include an annotated bibliography grouped into the disciplinary themes and career stages. We are open to suggestions on how you think providing and outlining the resources would be most helpful. This will be part of the landscaping report and will help researchers considering applying to Wellcome understand the resources available to them to engage with key stakeholders.

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	Is Wellcome committed to developing a new repository which would host relevant resources, or would you consider alternative approaches, for example the development of a signposting resource, pointing users towards relevant resources hosted elsewhere?	
	Question 5 asks for a delivery plan outlining the project deliverables (250 words) and timelines as well as how your approach to working with the lead contact throughout this project (300 words). What is the correct word count for this question?	This should be 300 words in the RFP and the reference to 250 words will be corrected in the RFP document.
10.	**Website:** As for the research engagement tools, we assume that we are expected to have a page on the website explaining the tool, but if it's an interactive tool based on another website or owned by another company, we will offer a link to the tool rather than trying to rebuild it on our website, correct? (This may also solve potential copyright issues.) Would Wellcome like to add or change tools on the website after it's delivered? Should we include a content maintenance option in our proposal? Would Wellcome host the website and take charge of its technical maintenance after delivery? Our website-building partner can provide a hosting solution on a subscription basis if needed, but we have not included this in the cost estimate for the project. Would Wellcome provide style guidelines for the website? We assume this will be treated as an internal site for Wellcome researchers only therefore it should adhere to Wellcome's branding guidelines. This means we do not need to spend money designing a new website identity. Is this correct?	In terms of the user-friendly repository, the expectation for this objective is that all resources mentioned/highlighted in the landscaping report or any reviewed throughout this project will be shared as part of the process. This could include an annotated bibliography grouped into the disciplinary themes and career stages. The report itself would serve as the repository. This will be part of the landscaping report and will help researchers considering applying to Wellcome understand the resources available to them to engage with key stakeholders. We do not expect website creation, design or implementation to be a part of this RFP. This landscaping report is primarily for internal use for the Research Environment team. However, we envision using the information provided to better support researchers considering applying for Wellcome funding through our guidance page. Therefore, what value these resources present to our researchers across disciplines and career stages will be an essential element to communicate.

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	Is there a preferred platform that Wellcome already has in mind for the website? For example, WordPress or Webflow. When does Wellcome wish the project delivery date to be? Is there an internal deadline for the website to go live that we should know?	Wellcome will be guided by the supplier as to what the most suitable timeline for this RFP would be. However, we would encourage the supplier to think about how they plan to undertake this work and what this would look like in terms of timelines. We would anticipate that the supplier outlines the milestones and build these into the project plan and linked to the deliverables suggested. We are open to suppliers outlining what would work best for them.
11.	**Quantity of participants:** What are the number of researchers expected to engage within the project?	Engagement with researchers would not be outside of the scope of this project, but any proposal should outline how they will undertake this work and how it will support the overall objective of the landscaping report. The number of researchers being engaged will be dependent on the approach and methods of the supplier.
12.	**Geographical demographics:** Does the RFP relate to all the geographies in which Wellcome funds research (in the global south and the global north)? Are there priority geographies to be considered in the delivery of the RFP? What is the geographical coverage that the RFP targets? We've taken that you would like us to engage with and consider applicants outside of the UK, is the case? If so, are there also any regions of priority?	The focus of the project should be to review existing resources (as outlined in objectives I and II) that will help researchers embed engagement into their research and the barriers that they face to do this work. The Discovery Research schemes this landscaping report will help provide guidance for outlines the following geographical demographics which should be considered: '***Our schemes are open to lead applicants based in the UK, the Republic of Ireland and low- and middle-income countries (as defined by the OECD) and co-applicants from the rest of the world if applying as part of a team.***'

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	We understand that Wellcome's research projects are often outside the UK and outside the EU. But we would like to know if the researchers who will use this repository are based in the UK, or are researchers also based in countries in the EU or even elsewhere in the world? In terms of geo-locations, what is the scope you would like to cover for this project? Can we assume to develop our output (website and report) for English-speaking users only (since English is the lingua franca of scientific research), or should we be prepared to deliver the website in multiple languages? Similarly, should we undertake research activities with potential users in languages other than English? If so, which languages should we expect? We recognise the need to establish an in-depth understanding of various contexts around the world across our work. Given the scope of the landscape report and the various applicability of this research to the target audiences and different facets of the research dimensions, is there an expectation to provide geographical applicability and considerations within the report? If so, are there any geographies that should be prioritised?	In terms of the user-friendly repository, the expectation for this objective is that all resources mentioned/highlighted in the landscaping report or any reviewed throughout this project will be shared as part of the process. This could include an annotated bibliography grouped into the key disciplinary themes and career stages. We are open to suggestions on how you think providing and outlining the resources would be most helpful. We do not expect website creation, design, or implementation to be a part of this RFP. This landscaping report is primarily for internal use for the Research Environment team at Wellcome where English is the primary language.
13.	**Collaboration:** What engagement will there be with the Wellcome team during the delivery of the RFP programme of work? Will there be regular meetings with the Wellcome team/project lead? Will Wellcome staff be involved in advising and/or participating in the programme of work? To what extent does the Research Environment team foresee cross – collaboration with the Community Engagement team at Wellcome, or will there be an opportunity to engage with them	There will be regular meetings with Wellcome during the delivery of the RFP and we are open to exploring how we can ensure we are working together. We anticipate an advisory role on the project. The Research Environment Team and Community Engagement Team work closely together and if the need to involve them arises it will be an opportunity that is explored. Wellcome is open to understanding what other formats the supplier feels would be beneficial to meeting the needs of the RFP. These will

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	as part of this RFP to enrich/build up on the findings? 2. Other than the landscaping report, would inclusion of other formats such as short videos highlighting some of the key approaches and messages be okay to include in the deliverables and costing? We have an extensive network of researchers (at varying career levels), policy makers and community representatives that we can engage in the research during the scoping exercise and to validate the usability of report in the final stages. Does Wellcome anticipate the supplier to leverage their network or is there an existing network of target groups that Wellcome has worked with in the past that should be engaged with for the scoping exercise? We want to interview a range of the researchers mentioned in your RFP. Would Wellcome help us recruit people that we can talk to? Our impression is that this website is primarily for researchers who undertake projects funded by Wellcome; therefore it makes more sense to reach out to the researchers currently working with/for Wellcome, via Wellcome. Please confirm if you agree.	be reviewed as part of the decision-making process so please include all costs and expected deliverables in the proposal. Wellcome would expect the supplier to leverage their networks. The landscaping report should focus on what is currently available or creating barriers to researchers who want to undertake engagement. While the output of this report will be used to support researchers looking to apply to Wellcome, it is not dependent on any Wellcome data or any explicit Wellcome experiences.
14.	**Costings:** Is there an expected budget range available for us to take into consideration? (especially a max budget) Is remuneration of participants to be included in this budget? Can costs be included for this maintenance even past the project delivery date? The RFP indicates a cost 'exclusive of VAT' should be provided. Can you confirm that applicable VAT will be covered	Wellcome will be guided by the supplier as to what a reasonable budget for this activity is, as we do not want to limit ambition or innovation. Proposals are in part assessed on value for money and as such we would expect to see a detailed budget breakdown (for example on time and resources) to allow Wellcome to feedback as needed with the awarded supplier. VAT will be covered by Wellcome where applicable.

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	by Wellcome on this contract? If so, how will this be implemented? What is the budget range for this project, in order for us ensure we provide a proposal that works for your budget?	The budget should detail all costs required to deliver the proposed RFP specification, including if remuneration of participants is required. Please ensure all costs are justified. Travel costs may be included but will subject to being agreed in advance and subject to satisfactory confirmation/ receipts.
15.	**Supplier type:** Can you confirm non-UK suppliers are allowed to bid for this work? Does Wellcome have a preference for a sole trader (with or without personal service company) over a registered company to deliver this work? Do you have any preferences or restrictions regarding the location of research activities?	From a compliance perspective non-UK suppliers can bid on contracts. Supplier due diligence checks are completed during shortlisting and contract negotiations. Standard terms and conditions are linked in the RFP for registered companies, individuals submitting a proposal as a sole trader, or an individual contracting through their own personal services company. We don't have a preference but ask that a proposal makes clear the organisation/ individual submitting the proposal. Wellcome does not have any restrictions regarding location for research activities apart from sanctioned countries.