



Request for Proposal (RFP)

Archive, manuscript and material culture resources for life, health and wellbeing research

1. RFP Background & Objectives

Wellcome is seeking to commission a landscape report with the following objectives:

- Describe the unique value of archive, manuscript and material culture resources for research to understand life, health and wellbeing across the humanities, social sciences and life sciences.
- Understand the challenges/barriers to be tackled in order to significantly enhance approaches to using archive, manuscript and material culture resources for life, health and wellbeing discovery research.
- Detail the approaches, technologies, material/data and capabilities that could contribute to solving the challenges/barriers to maximise this research.
- Define the opportunities for transformative life, health and wellbeing research that would be enabled by working towards the goal of significantly enhancing approaches to using archive, manuscript and material culture resources.

1.1 Wellcome and Discovery Research

Wellcome is a politically and financially independent charitable foundation. In 2021, Wellcome established the Discovery Research programme that aims to transform understanding of life, health, and wellbeing through curiosity-driven research across a diverse range of perspectives and contexts.

Wellcome is the largest funder of health-related humanities and social science discovery research in the UK. We have invested in research to understand the historical, social, political and cultural contexts of life, health and wellbeing for many years, including supporting an array of individual and team research, projects and networks, centres and institutes, and key archive, manuscript and material culture resources in a variety of libraries, archives and museums. Our [Discovery Research strategy](#) has reiterated our commitment to supporting a broad and diverse range of life, health and wellbeing research, including key research infrastructures, capabilities, resources and tools and technologies in the UK and globally.

Wellcome's humanities and social science portfolio encompasses a wide range of data, methods, and tools. Our goal is to increase the diversity of perspectives and approaches across this portfolio to further understanding of life, health and wellbeing. We want to support diverse, bold, creative and high-quality transformative research, underpinned by cutting-edge tools, technologies and capabilities.

To this end, we want to explore the challenges, barriers and opportunities in the research use of archive, manuscript and material culture resources to understand life, health and wellbeing across the humanities, social sciences and life sciences. By doing so, we hope to raise visibility and awareness of these resources and determine what further actions are necessary to unlock bold, creative and high-quality research on life, health and wellbeing.

1.2 Archive, manuscript and material culture resources



Archive, manuscript and material culture resources are critical for a broad range of historical, social, political, cultural and scientific research to understand life, health and wellbeing. They include (but are not limited to) the papers of individual scientists, clinicians and health workers, the records of scientific, clinical and health-related organisations, health-related manuscript and audio-visual material, and biological, archaeological and anthropological artefacts from a variety of geographic, cultural and historical contexts.

Despite the existence of a globally-distributed research infrastructure of libraries, archives and museums that preserve and provide physical and digital access to these resources, numerous barriers impede research use. These include:

- backlogs in the documentation of physical collections;
- difficulties in preserving and providing access to new forms of digital material;
- challenges in applying new tools and techniques to aid access, discovery and use at scale.

Geographic barriers to accessing these resources also significantly impede research use, with the need to both identify and document the connections that exist between distributed collections, and to better link collections located in diverse metropolitan centres to global research communities (for example via digitisation and targeted outreach).

There is also crucial need to ensure that the development and use of archive, manuscript and material culture resources is equitable, diverse and inclusive for the global research community, and that key legal, ethical, conceptual and methodological barriers to research use are appropriately addressed (whether relating to human remains, sensitive religious and ceremonial artefacts, or historic and contemporary archives and manuscripts).

A wide range of actors are working to address these and related concerns, with efforts led by major research libraries, museums and consortia, aided by government funding organisations (such as the AHRC in the UK) and philanthropies (such as the Mellon Foundation). However, Wellcome's global focus on life, health and wellbeing discovery research is distinctive in this context.

1.3 Landscaping requirements

We want to gain a better understanding of this landscape and what Wellcome's role might be in ensuring that the use of archive, manuscript and material culture resources is significantly enhanced for life, health and wellbeing discovery research, and where any future funding or partnership efforts could be directed.

In order to accomplish this, we plan to commission an external Supplier to explore the current global landscape of the research use of archive, manuscript and material culture resources for understanding life, health and wellbeing, and what the challenges, barriers and opportunities are to this end. Wellcome is a global funder, which necessitates a global perspective, as different regions will encounter different challenges, and present different opportunities.

Equity, diversity and inclusion is integral to our ambitions in this work, both in terms of the people and perspectives to be included in this work, and the research challenges, barriers and opportunities to be explored.



Scope: We are interested in the role of resources and enabling capabilities for discovery research as described within the [Discovery Research](#) remit – research that will generate new understanding and with the potential to improve human life, health and wellbeing. We are keen to explore the global landscape with a particular interest in geographies where Wellcome Discovery Research currently targets funding (UK, Republic of Ireland and Low- and Middle-Income Countries). We aim to identify broad areas to understand archive, manuscript and material culture resources and their use for discovery research but are not focusing on opportunities to develop new core infrastructure.

Exclusion: Studies that are not within the Discovery Research remit are out of scope for this review. This includes research on large-scale clinical trials; tools, technologies or methodologies predominantly to be used for diagnosis, treatment or improving clinical care; and studies involving animals.

2. RFP Specification

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

Wellcome is seeking a Supplier or group of Suppliers for up to a 6-month contract to produce a comprehensive landscape report on the use of archive, manuscript and material culture resources for life, health, and wellbeing discovery research. As set out above, the objectives are to:

- Describe the unique value of archive, manuscript and material culture resources for research to understand life, health and wellbeing across the humanities, social sciences and life sciences.
- Understand the challenges/barriers to be tackled in order to significantly enhance approaches to using archive, manuscript and material culture resources for life, health and wellbeing discovery research.
- Detail the approaches, technologies, material/data and capabilities that could contribute to solving the challenges/barriers to maximise this research.
- Define the opportunities for transformative life, health and wellbeing research that would be enabled by working towards the goal of significantly enhancing approaches to using archive, manuscript and material culture resources.

The delivery of the final report will involve various qualitative and/or quantitative data collection methods, such as desk-based research, interviews, focus groups, workshops, and case studies, and cover four parts:

- i. **Mapping the current use of archives, manuscripts and material culture resources in life, health and wellbeing research in the UK and globally.** To include:
 - a. A representative range of disciplines, geographies and methodologies.
 - b. Key enablers and barriers (e.g., tools and technologies, knowledge and skills, access and discoverability).
 - c. Examples of significant, collaborative and funded initiatives.



We would be interested in seeing a variety of examples and case studies – for example, use within historical and interdisciplinary medical/health humanities and social science research, in anthropological, archaeological and bioarchaeological research, Indigenous studies research, and in biomedical and natural sciences research across a range of relevant domains.

- ii. **Mapping the current nature, initiatives and ambitions of research libraries, archives and museums that hold key archive, manuscript and material culture resources of relevance to life, health and wellbeing research.** To include:
 - a. A representative range of organisations and geographies.
 - b. Key enablers and barriers (e.g., tools and technologies, knowledge and skills, access, integration and prioritisation).
 - c. Examples of significant, collaborative and funded initiatives.
- iii. **Mapping opportunities through which the current archive, manuscript and material culture resource landscape can be enhanced for life, health and wellbeing research, including potential synergies with other funders. The aim is to identify the area/s, and options/priorities, where Wellcome and others can have significant impact.** To include:
 - a. A range of disciplines, resource/material types, and research methodologies.
 - b. Key enablers (e.g. tools and technologies, knowledge and skills, access and discoverability).
 - c. Activities of other actors and funders in this space.
- iv. **Provide recommendations related to and supported by the analysis and case studies identified in part iii.**

The final report will be the result of an iterative process towards which the Wellcome team is inputting via regular interactions. The recommendations should fit a wide range of stakeholders, including research funding organisations and resource repositories. Specific recommendations for Wellcome should also be developed, identifying areas where we can facilitate further work to address our Discovery Research strategy.

Parts i. and ii. would be conducted in parallel as their outcome should inform part iii. and iv.

Key deliverables to be included:

- i. Inception report – to include the detailed scope of the work, a detailed outline of the methodology that will be used to address the landscaping requirements outlined above, and a detailed timeline for completion of the work.
- ii. Initial findings presentation – A summary of the findings from Parts i. & ii. will be presented to the Wellcome team for discussion and feedback during one of the touchpoint meetings.
- iii. Final report delivered in two stages:
 - a. A **draft final report**, which will be shared with Wellcome 4 weeks (minimum) in advance of the end date to allow Wellcome staff and other stakeholders involved in the work to give feedback, raise questions, and make recommendations for further improvements.



- b. A **final report**: a clean and final copy which will be delivered after incorporating feedback on the draft report from Wellcome. We anticipate that the report will be made available publicly.
- iv. Slide deck of summary findings.
- v. Presentation of the findings to the Wellcome team, to be delivered virtually or in person, with time for Q&A from the Wellcome team.

Additional information for the Suppliers:

- The Supplier/s would be required to set up an advisory board (with external and Wellcome members) to ensure that strong technical expertise is incorporated into the final recommendations. We expect the setting up of this board to be an iterative process with Wellcome.
- The work would be carried out by either a single external Supplier or a group of Suppliers. The Supplier/s could be consultancy organisations or research groups, so long as they have the required expertise, partners, and track records to undertake the work outlined above.
- The Supplier/s would be required to evidence that they have the right expertise in the team or the ability to contract it in to ensure that strong technical expertise is incorporated into the final recommendations.
- Wellcome intends for this piece of work to equally cover both the UK/HICs and LMIC landscape, addressing the different needs in both settings. We anticipate that the selected organisation will engage with experts/researchers and have experience in working within and/or with LMIC researchers. The Supplier/s would be therefore required to evidence of how they will deal with the global scale and LMIC contexts of the RFP specification.
- At the selection stage, Suppliers' data will be shared with a representative from the AHRC, who will be taking part in the selection process. This reflects our close working relationship with UKRI across a number of activities where we aim to leverage our shared knowledge and ambitions.
- This project will require close working with Wellcome throughout the life of the project. We will expect regular, weekly meetings with the Supplier throughout the project.
- 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. Proposals will need to account for any VAT requirements – at 20% if you are based in the United Kingdom, or if you are not based in the United Kingdom, please allow 20% for reverse VAT charges that Wellcome will self-account for.



3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issued on Contract Opportunities webpage	Wellcome	5 June 2024
2	Submission Supplier Q&A	Supplier	19 June 2024
3	Return of Supplier Q&A to Suppliers	Wellcome	28 June 2024
4	Submission of RFP Response	Supplier	25 July 2024
5	RFP Evaluation Period	Wellcome	26 July - 3 September 2024
6	Supplier Presentations	Supplier	September 2024
7	Notification of Contract Award	Wellcome	October 2024
8	Contract Negotiation	Wellcome & Supplier	October 2024
9	Contract Start Date	Wellcome & Supplier	November 2024

4. Response Format

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

Supplier Q&A

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 a 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



RFP Response

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

#	Question	Max words
1	<p>Experience: Outline your experience in the area (e.g. case studies where you successfully provided similar services to those described in this RFP) and whether/how you will work with experts to cover the gaps in your knowledge. Include any relevant experience completing qualitative research and landscaping analyses. We expect the supplier's team to be diverse in membership and inclusive in practice. We also expect the supplier to meaningfully and ethically involve and collaborate with diverse stakeholders in the design and delivery of the project, as relevant to the deliverables.</p>	1500 words
2	<p>Methodology: Detail your methodology for completing this analysis, including:</p> <ul style="list-style-type: none"> • The approach and methodology, and how you will address the RFP specification. • Plan for equity, diversity, and inclusion (how you will ensure that the research conducted will be inclusive and representative of different resource settings/groups and that your methodology does not introduce bias). • Plan for engagement with stakeholders. 	1500 words
3	<p>Delivery and Output: Describe your proposed project plan and timelines with key milestones and deliverables against each of these. This should include:</p> <ul style="list-style-type: none"> • Management plan, including the role of team members. • Project deliverables. • Plan for engagement with Wellcome during the contract. • Plan for production of the final report, including copy editing, formatting and graphics. • Anticipated risks and challenges, ways to mitigate them, and quality assurance efforts for your work. 	500 words
4	<p>Equity diversity and inclusion (EDI): Outline your EDI policies and how you will ensure equity, diversity and inclusion considerations are embedded throughout the planning, development and delivery of the project.</p>	500 words
5	<p>Budget:</p>	N/A Table



#	Question	Max words
	Provide a detailed budget including all costs and expenses, specifying all day rates of individuals involved, the allocation of days between members of the team, and the cost of activities.	

Evaluation Criteria

Criteria	Detail	%
Experience	<p><i>Skills and Experience:</i></p> <ul style="list-style-type: none"> • Relevant skills, experience, and contextual understanding to deliver this work. • Demonstrated ability to address potential gaps in knowledge and experience if necessary. 	30%
Methodology	<p><i>Coverage:</i></p> <ul style="list-style-type: none"> • How well the proposal meets the RFP specification. • How well the proposed methodology aligns with our equity, diversity and inclusion goals. 	30%
Delivery & Outputs	<p><i>Delivery plan:</i></p> <ul style="list-style-type: none"> • Proposed delivery plan is appropriate and achievable. • Any risks are identified and mitigated. <p><i>Communication:</i></p> <ul style="list-style-type: none"> • A good plan for communicating with the Wellcome team. 	20%
EDI	How well are equity, diversity and inclusion considerations embedded throughout the development and delivery of the project.	15%
Budget	<p><i>Value for Money:</i></p> <ul style="list-style-type: none"> • The proposed work represents good value for money. 	5%
	Total:	100%

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.

Wellcome will not consider negotiations that are raised in your response to this proposal i.e. 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 up to an hour in total and will be a PowerPoint presentation followed by questions and answers session.

1. About Wellcome

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. We support discovery research into life, health and wellbeing and we're taking on three worldwide health challenges: mental health, infectious disease and climate and health. Find out more about Wellcome and our work at: [wellcome.org](https://www.wellcome.org).

2. 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.

3. 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.

4. 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 \(www.gov.uk\)](#). 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.

5. 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.

All our content should be WCAG 2.2. AAA compliant. Any documents being provided to Wellcome must pass accessibility requirements. If you are unable to produce accessible documents, budget must be set aside to employ a suitable agency to do this work.

6. 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.

7. Funding

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



8. 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.

9. 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.

10. Wellcome Contact Details

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

Name:	Sabrina Al-Khafaji
Pronouns:	She/Her
Role:	Procurement Officer
Email:	RFP@wellcome.org