Developing a research commissioning process

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https://research.mysociety.org/publications/research-commissioning-process

About mySociety

mySociety is a not-for-profit group, based in the UK but working with partners internationally. We build and share digital technologies that help people be active citizens, across the four practice areas of Democracy, Transparency, Community and Climate. As one of the first civic technology organisations to be established, we are committed to building the Civic Technology community and undertaking rigorous research that tests our actions, assumptions and impacts. Our global research work into digital democracy, civic technology and user-centred design has positioned mySociety as a leading authority in digital civic engagement and participation.

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Introduction

mySociety is developing a new process for commissioning research. In the first instance, this will be for several pieces of work as part of our Climate Programme. But we want to use this process to commission work in other areas, including through our commercial arm, SocietyWorks, so it must be flexible and reusable.

There are practical and principled reasons for working in this way. In practical terms, although mySociety has produced valuable and impactful research in the past, our research team is currently small and very busy. In principled terms, collaboration is one of mySociety’s core values (alongside openness and justice); partnering for impact and diversity is one of the areas of focus in our new strategy.

This short report, the product of desk research and conversations, outlines key considerations at various different stages of the research commissioning process and proposes a pilot research commissioning process for mySociety. In the interests of openness, we are publishing our thinking in order to solicit comments and improvements, and in the hope that it will also be of interest to
other organisations. Our focus is on a small charity commissioning relatively small projects, but some of the lessons may be of wider use.

**Overall approach**

Our approach should reflect mySociety’s core values and strategy. Our ‘**Repowering Democracy**’ strategy puts a strong emphasis on changing our ways of working to involve greater collaboration and partnership with outside groups and organisations.

Commissioning research from outside organisations and researchers is a way of achieving core goals through a broader definition of the “mySociety team”, but our approach to doing so must reflect the underlying principles that drive our public work and values. In the context of commissioning research, this involves three key principles:

- **Equity**: ensuring our research opportunities are as inclusive and accessible as possible, attracting a diverse field of applicants, respecting different ways of working, and properly compensating successful candidates for their work and not making excessive demands on unsuccessful ones

- **Openness**: being as open as we can about our commissioning process and our commissioning decisions, being upfront with applicants about our expectations and open to their comments and challenges, and expecting them to work in the open as far as possible (including outputs being published)

- **Collaboration**: working in partnership with those we commission rather than seeing it as a purely transactional relationship, respecting the skills and expertise of our partners (including where it challenges our own thinking), providing a supportive environment for our partners, and maintaining a mutually beneficial ongoing relationship with those we commission.

In recent years, there has been a lot of discussion about and initiatives to improve philanthropic giving and grantmaking. Although there are important differences between this and commissioning research, there is much we can learn. For example, at least some of the five common weaknesses of traditional grantmaking identified in *Modern Grantmaking* by Gemma Bull and (former mySociety CEO) Tom Steinberg could apply to commissioning, such as money following social ties at the expense of making the right decision; getting money out of funders too often being a miserable experience; and funders often steering grantees to do unhelpful things, which *‘sounds reasonable until you consider that it means that a person who is an expert in their job is being told what to do by someone who has likely never done that job. This form of back-seat*
**driving leads to services that waste time and produce lower-value outcomes than would otherwise be possible.**

Modern grantmaking, in contrast, tries to ensure all organisations (including from marginalized communities) are ‘empowered’ to receive funding, not just those with existing links; that grantees are seen as partners in ‘trust-based ways of working’; that grant decisions are made on evidence and overcome funders’ biases; and that grantees are not micromanaged and can make their own decisions. The defining values for funders should be humility, equity, evidence, service (we owe a duty to those we fund), and diligence (hard, focused work). In the context of commissioning research, this means balancing clarity and direction from the commissioner with the necessary trust and flexibility for the researchers to be able to deliver, investing in our side of a partnership relationship, working to attract as wide a pool of applicants as possible, and dealing with all applicants with decency.

These principled considerations combine with practical ones – mySociety has a small staff, a small research team and will be commissioning small projects – to suggest an agile, flexible and light-touch, but also clear and rigorous, research commissioning process. Larger organisations and larger bids may require more substantial processes – but we need to not over-engineer a process given our capacity, and the costs involved. This report therefore develops a template for a standard process which can be adapted to different situations.

## Developing a proposal

Clarity and concision are key to a good proposal. Before getting into the details, the commissioning organisation should be clear on why it is commissioning in the first place. Possible reasons include accessing new skills, new methods, particular knowledge and expertise, particular data or institutional knowledge, or simply capacity. It should be clear on what it needs to commission or whether to commission at all. Rather than new research, for example, it may be better to commission a literature review (if this already exists, it may not need to be commissioned at all). Once a proposal has been costed, it may make more sense to do it in-house (unless capacity is the main reason for commissioning). There should be an internal decision point here too - does the work need to be commissioned, or can it be handled in-house? The process of developing a proposal, as outlined below, will still be of use in designing a research project delivered internally.

Developing a proposal also requires understanding key stakeholders and communities, internal and external. Colleagues will be able to bring insight and advice, and may also be impacted by the proposed research themselves (what if they need to be involved at any point?). Any communities that could be impacted by the research should also be involved or taken into consideration as the proposal is developed.
The proposal should be concise but comprehensive – a few sides of A4 (or HTML equivalent). It should include:

- A very brief introduction to the commissioning organisation
- A short introduction to the project (particularly its aims and intended audience)
- A short introduction to the organisation’s research process (if relevant)
- Any important background information, and links to previous relevant work
- What the commissioning organisation is looking for in a partner
- What they are looking for from a partner in terms of outputs and deliverables
- What the application should look like
- The criteria against which that application will be assessed
- The key milestones of the application process
- Likely key milestones for the commissioned work, including expectations around project management and communication
- What will happen to the completed work
- What will happen after the work has been completed, in terms of an ongoing relationship
- A figure for the budget, and terms of budget
- Any crucial legal considerations and terms and conditions.

A key theme from others involved in commissioning is the need for clarity about the research question and main audience above all else – what are you trying to answer, why, and for what audience? One organisation we spoke to said the right initial question to ask was what you want to achieve. Rather than starting with a particular product in mind (e.g. a report), ask what kind of policy or practice impact do you want to have on the world.

In the proposal, this should also translate to being clear about how clear you are on the product being commissioned. Do you have in mind a very specific piece of work and output (e.g. a literature review on a particular subject), or an answer you want to get to that could be addressed by a variety of different research methods and projects? Even if the former, those responding to the call for proposals should have space in their application to share their insights on alternatives. Where in your own research process does this work fit? This could involve understanding where in the ‘double diamond’ the work sits. In mySociety’s case, our research stages include scoping and orientation (establishing questions, perhaps preparing the ground for further commissioned research), exploratory research (a dive into the literature, interviews with close contacts) or more focused research (an investigation into a more specialised problem, or a review of more specialist literature), before moving onto writing up, editing and reviewing, and publication.

A good call for proposals should also consider what different types of applicants might want or need, and which types of applicants would be best suited to the project being commissioned. These include individuals, individuals who could be brought together as part of a team, research
agencies, other research or civil society organisations (such as think tanks), or academics. Academics, for example, might be looking for the kudos of bringing in money to their institution (a promotion criterion for many), the ability to author academic papers based on the research (perhaps in partnership with the commissioning organisation), and impact (what might the commissioned research actually lead to), as well as research interest. Any such opportunities should be highlighted in the call for proposals. Timing was also more likely to be a consideration in attracting academic applicants: they were likely to have more time to get things done at the beginning of a calendar year or over the summer (late autumn and spring therefore being good moments to advertise). Individuals or non-academic research organisations would not be operating under similar calendar constraints, and might be looking to build longer term relationships leading to future work. Others may be after different things. One research organisation told us they looked for clear goals and audience for the work being commissioned, work that fitted their skillset, realistic timescales and a good match between budget and what was required, and work that matched what they wanted to achieve as part of their working lives.

The call for proposals should give an indicative budget. This gives applicants a sense of the size, scale and scope of the work. This should also make clear costs that may be part of the project but that the applicants are not expected to factor in (for example, production costs on any report that would be borne by the commissioning organisation), or things that will not be accounted for separately and should be part of any budget prepared by the applicant (particular expenses). To calculate this, several interviewees recommended that the commissioning organisation think about the days (and people) they would require to do such a project themselves, and use this as a starting point. They should then refer to the day rates applicants were likely to have in mind to come up with an indicative budget. Our interviewees suggested depending on seniority, between £600 and £1000 for full-time academics, and between £400 and £900 for commercial agencies. Having a menu of particular research tasks, such as conducting a certain number of interviews, or producing outputs of different lengths and the time likely to be taken could also be useful. These estimates can be refined as projects are commissioned and completed. All of the above would also be helpful when starting with a budget and trying to understand what scope might be viable. If the two don’t match, either the budget may need to be increased, or the scope narrowed.

Calls for proposals should be clear in how much weighting will be given to applicants’ proposed budgets. Interviewees suggested that a higher weighting was probably only appropriate for large projects (higher tens and hundreds of thousands of pounds), where it might help differentiate applicants. For smaller commissions, asking for excessively detailed budget proposals may be unnecessarily burdensome. It should be enough to accept lump sum budget lines, digging into more details if necessary and trusting the organisation to be able to spend the money as they see fit to deliver the project. Where it is expected there will be interviews with service users or members of the public that would be appropriate to pay for, this should be indicated in the call for
proposals. Although not relevant to many research outputs, such as reports, any ongoing technical or maintenance costs (for outputs with a website element, for example) should also be included in proposed budgets.

There are some further practical considerations when it comes to budget and finance. Some universities may not need to charge the full economic cost of a project, for example if the commissioning body is a charity and the university has a remit or reimbursement to support charities; similarly, some commercial agencies may have lower rates for working on projects with the third sector. On long running projects, rules around ensuring contracted workers, who would have been treated as employees if they were providing services directly to the client, are paying the right rates of tax and national insurance (IR35), should be considered upfront, including the implications for commissioning different groups (organisations versus individuals versus building a team of individuals, for example). There may be additional considerations if organisations based outside the UK want to bid. These should be built in from the start, and made clear in the call for proposals any additional requirements (or exclusions from applications).

The call for proposals should also state when the money will be paid (all upon completion, or by instalments at different stages of the project). The easiest way to pay those commissioned to do the work is likely to be invoicing within a contract: for small projects, once the project has been completed; for larger ones, at milestones agreed in advance. The commissioner will need to decide how any suggested budget handles VAT. If an applicant has to charge VAT, should it be included within the suggested budget, or should that suggested budget be clearly marked ‘excludes VAT’? Commissioning on the charitable side of the organisation cannot reclaim VAT, and so budgets should be made inclusive of VAT, whereas commercial research commissioning should allow budgets that exclude VAT.

Indicative timelines for the project should factor in timings for processes on the commissioning body’s side, which the commissioner ought to have a better idea of and be able to incorporate (and book in appropriate time for) from the start. This includes editing and publication timelines, including the availability of staff (particularly senior staff) for review and sign off.

The proposal should also consider the ongoing relationship with successful applicants once the project has been delivered. This might include further work related to the project that could be budgeted from the start. This might include presenting elements of the project to staff in the commissioning body, presenting the work at public events (both the Low Pay Commission and ADR UK provide such opportunities as part of conferences, for example), ‘keep in touch’ days to follow up on the impact of the project and discuss future opportunities, or even setting aside some budget for future advice and discussion even when the exact nature of that may not be clear at the start of the project. Related to this is the question of how the commissioning organisation can best embed the commissioned project and its findings in its institutional memory. As well as follow up
upon completion, this could include some light touch involvement of commissioning body staff in the project itself (e.g. attending some key interviews or other research activity as an observer) or ensuring some catch-ups during the project are designed for knowledge transfer. Again, these should be considered as the proposal is put together, and in the kick-off meeting with the successful applicant.

Once a template for a call for proposals has been developed, it can be iterated and reused. Some aspects – such as any crucial legal or financial information – will likely not need to change. Some organisations host this type of information on a webpage which multiple applications can point to, although it may be preferable to include all highly pertinent information in the call for proposals itself to make life easier for applicants.

**Commissioner time and resources**

- A template call for proposals
- A template for costing projects, to iterate over time (to include day rates, time expected for particular outputs or activities)
- Adapting the proposal template for specific calls, including costs and timelines
- Achieving internal sign off on call for proposals

**Advertising**

Once a call for proposals has been completed, it is time to advertise it. But the first question might be: is it necessary to advertise it at all, rather than speaking to a trusted, existing supplier of research? There are sometimes good reasons not to run a competition. In its [2002 guide to commissioning](http://example.com), the Social Research Association cites urgent timescales, there being an obvious supplier, and the project being small as valid reasons not to advertise, and says organisations should not be afraid to do this. For small commissioning organisations, running rigorous open competitions is particularly time consuming. There are downsides to this approach. The commissioner is not benefitting from the full, diverse range of talent and innovative ideas available, and risks returning to a small, non-diverse pool of suppliers, foregoing the opportunity to build relationships with a broader range of organisations.

As the Social Research Association puts it:

> **Successful research commissioning has to achieve a difficult set of balances between a wide range of factors** – the quality, reliability and credibility of the project itself, the insights it provides, the usefulness of its outcomes, the value for money it represents, its timeliness and so on. The commissioning process itself needs to be fair and accountable as well as effective, and should keep the door open to new research talent, while at the same time maximising
the value of the experience and momentum that established suppliers can provide, and rewarding them for good work.

Some organisations balance these factors by allowing speculative applications. This allows researchers or organisations who would be interested in working with the commissioning organisation, even if there is nothing specific being advertised at the moment, can get in touch to express an interest. This might also involve building pools of researchers they can contact, especially if work is needed at short notice. Doing this in parallel with open commissioning processes could maximise the pool of talent available and interested in applying, and help mitigate some of the downsides of not advertising when this is necessary. It may also be particularly helpful in the early days of an organisation commissioning for the first time, when the market may not be warmed up to that organisation advertising research opportunities. It will take time for an organisation commissioning for the first time such as mySociety to establish itself as a place researchers can look to for specific opportunities. Larger organisations may have time to do all of this more systematically, with criteria for becoming part of the pool (for example, having to respond to mock briefs) and interviews or chemistry meetings. Strong applicants who are unsuccessful in specific bids could be invited to join the pool.

When it comes to advertising specific opportunities, a commissioning organisation first needs to use the existing assets it has, including mailing lists and contact databases. It should think about the respective timings of research opportunities and regular publications like newsletters, to ensure these are used to promote calls for proposals, and whether a specific mailing list for research opportunities is worth starting. The first place to advertise should always be the organisation’s own website, promoted through its mailing lists and social media accounts. It is where people interested in the organisation, aligned with its values and likely to be interested in opportunities with that organisation will be.

Of course, the commissioning organisation should not limit itself to its existing audience, and should seek to reach as wide a range of possible applicants as possible. Whenever a call for proposals is being developed, some time should be given to thinking about the stakeholder map, and the other organisations operating in that ecosystem. Other tools may be helpful in understanding organisations active in particular areas. For example, 360Giving’s tools allow you to explore organisations who have received funding in particular subject areas.

In general, places to advertise to reach as wide an audience as possible include existing procurement portals, such as Contracts Finder (via the Crown Commercial Service). In particular, the Crown Commercial Service has a Research and Insight Framework and has a page offering support to charities (though again, it’s not immediately obvious how far this extends beyond IT and business services). Other portals recommended include Pro Contract Due North, via Proactis.
There are some that may be particularly useful for reaching other charitable organisations. Some briefs may be appropriate for Consultants for Good, ‘a UK-wide network of consultants and trainers who provide professional organisational development services for the voluntary sector’; Charity Jobs, ‘the first charity specialist job site in the UK’; and the Voluntary Sector Studies Network, a membership organisation whose aims include ‘providing a voice and a meeting place for voluntary sector researchers in the UK’. W4MP may also be appropriate for finding individuals for research and policy projects.

For reaching academics, *Research*, which sends emails to signed-up academics and institutions based on their search preferences, is a further option.

In general advertisement needs to be assigned some explicit budget, both in terms of staff time and portal costs. mySociety is making active attempts to ensure our vacancies reach a more diverse audience of jobseekers. This includes maintaining a list of job boards and groups to post on to reach beyond those already engaged in our networks. While these are mostly focused on tech jobs, depending on the project, some may be a useful place to advertise research projects.

### Commissioner time and resources

- Ensure existing assets – databases, mailing lists – can be used to share details of calls for proposals
- Signing up to existing procurement portals
- Investigating some paid services, and potentially paying
- Maintaining a ‘pool’ of researchers and organisations for unadvertised work, and the ability to respond to and assess applications received
- Drafting a list of occasions of where not advertising widely may be permitted?
- Starting a dedicated proposals mailing list?

### The application process

The call for proposals and the details and operation of the application process should be as accessible as possible, in everything from document formats on the commissioning organisation’s own website (HTML is more accessible, PDFs likely to be downloaded to refer to, or be shared) to how the process operates. Expectations for dates and how the process should work should be clear, and kept to. All of this should ensure an open and equitable process which is fair to all applicants. It is also a useful way of keeping the commissioning organisation to the timetable (deviating substantially from it will not lead to the best reputation and will likely discourage future applicants). The advert should be kept up permanently, though clearly marked as ‘closed’ once the
process has finished, and include a link to the final work. This is good for openness and in assisting future applicants.

In mySociety’s recruitment process applications are anonymised before being reviewed, with names normally only revealed after an interview shortlist has been created. This means applicants are asked to use initials/remove identifying details (or this is done manually as part of the sorting process). An anonymous equality monitoring survey is used in the initial application process to separately understand the demographic reach of the current application process. This is a method that would need a different approach for organisational submissions, and the stage at which it is used needs to be weighed against the additional workload it adds to applications. Possible approaches include individual surveys for potential team members, an aggregate breakdown across a team, and this which would need to be sensitive to protected characteristics that may not be disclosed to employers (as such, may ask less questions than a personal survey). Alternatively, bidders may be asked for general evidence of recruitment practices, procedures, working practices and values that support greater equity and inclusion. This could be directly in scoring criteria, and is more suitable to larger commissions where larger teams and organisations are more appropriate.

An ideal process would look something like this:

- **Call for proposals published**

- **Period during which questions can be asked by potential bidders (at least 2 weeks)**

  Several organisations provide time in which potential bidders can email questions to help them clarify aspects of the call for proposals. As well as being helpful to the potential bidders, it should help the commissioning organisation understand if there are any common issues, challenges and comments that they should have in mind when dealing with this commissioning process, or that they should change for future ones. Several organisations go a step further and hold some form of Q&A webinar. The advantages of this, over a simple email approach, include: the quality of questions (bidders emailing questions may duplicate questions and have no opportunity to follow up on answers; listening to others ask questions may stimulate further questions), having a better sense of particular issues around this project, getting a better sense of how many bidders can be expected, and even helping individuals who might be interested in bidding to see whether they might be able to team up with anyone (this would require sharing contact details of those attending the webinar, where they had given permission). On the other hand, this could change the dynamics of who might bid - if certain organisations were seen to be bidding and thought likely to succeed, others could be put off. Keeping the question period going for longer allows more time to publicise the call for proposals.
• **Answers to all submitted questions provided on the application page (a further 1 week)** In the interests of fairness, answers to any questions submitted to the commissioning organisation should be made available to all potential bidders – i.e. published, with a link emailed to anyone submitting questions. If a Q&A webinar has been held, the video should be made available.

• **Deadline for applications (a further 1 week)** The application itself should be short – a few pages of A4, or equivalent. A page limit is more useful than strict word limits on specific questions. Interviewees suggested this, rather than anything more outlandish (such as video submissions) would be most helpful. The commissioning organisation should clearly state what it wants to see covered in the application – particular questions, details of past experience, a high level breakdown of budget – and allow some space for the applicant to be creative in thinking about, even critiquing, the proposed work.

• **Initial decisions conveyed (a further 1 week)** During this period, the commissioning organisation will have time to review applications received. Ideally, this should involve a number of different people from the organisation bringing different insights. Applicants not making it past this stage should be informed politely and clearly, with the option of (or perhaps automatically) receiving a few sentences of feedback on their application and why it did not make it to the next stage. If the commissioning organisation feels that there may be future opportunities that would suit the applicant, they may ask whether the applicant would like to be added to their pool of researchers or research agencies (if they have one), or otherwise kept informed of future opportunities via a dedicated mailing list – but this should only happen if there is a realistic chance of them being suitable in future.

• **Interviews (a further 1 week)** While interviews are imperfect as an assessment method – and it can be difficult to get past ‘interview face’ to understand how effective an interviewee will actually be in delivering the project – they provide an opportunity for the commissioning organisation to meet their potential partners, to check alignment of values and expectations between commissioner and applicant, and to raise any particular questions from the original application. (If an organisation is shortlisted, this should include understanding which staff will actually be involved in the work.) Again, having more than one person involved in interviewing from the commissioner side will bring different perspectives.

• **Final decision conveyed (a further 1-2 weeks)** Ideally, the commissioning organisation should meet as soon as possible after interviews to make a decision. Specifying a slightly longer timeframe means that any internal challenges – availability of decision-makers, unexpected work commitments – won't disrupt the expected process for applicants. It will also give the commissioning organisation time to contact the successful bidder before
letting unsuccessful applicants know. Unsuccessful applicants at this stage should again be offered (or automatically given) feedback, perhaps via a virtual meeting or call rather than just an email.

- **Project brief/kick-off meeting (as soon as possible).**

It may be possible to shorten some of these stages, especially if there are relatively few applicants (or by e.g. ensuring any email questions are answered at the very start of week 3, condensing the application period to 3 weeks, or conveying the decisions very quickly). Given constraints on time and people in the commissioning organisation, it may also sometimes be preferable to drop the Q&A webinar in favour of potential applicants just emailing questions. But it is worth investing time in the process to get the right outcomes – especially in the early days of an organisation commissioning work. Another factor is that, while such a process doesn’t need to be overly complex, it should be rigorous and robust enough that the commissioning organisation can defend any decision it came to in the awarding of work, should it be challenged.

Some supply chain management may be necessary at this point, with the finance team needing to assure that any suppliers commissioned are above board.

### Commissioner time and resources

- Availability of staff for sifting applications
- Availability of staff for interviews
- A template Q&A webinar format
- Availability of staff for webinar, and to answer questions via email
- A dedicated questions email address
- A template interview script
- Availability of staff for a decision meeting
- Availability of staff for feedback to unsuccessful applicants
- A template contract
- Updating page advertising the opportunity once the process has closed, and once the work is finished

### Managing the project

Once the project has been awarded, the commissioning organisation and successful applicant should arrange a kick off meeting which discusses how the project will be delivered in more detail, seeing both parties as partners in delivering the work successfully. This conversation should include a discussion about what onboarding the supplier needs from the commissioning organisation. What does the supplier need to know about the commissioner’s ways of working and
what access might they need to the commissioner’s systems and resources in order to deliver the project? At a minimum, the commissioner should be able to provide a short set of standard resources – a few pages of A4 with further information about the organisation (concise but with links to further information), its ways of working and relevant documents (such as template interview consent forms), a link to any relevant style guides (written and visual) highlighting anything of particular relevance for this project, and details on how to access any internal systems or tools (e.g. Slack, Teams, appropriate Google Workspace files and tools). They should also ensure that any requested onboarding from the supplier actually takes place.

In terms of project management and oversight, the commissioning organisation needs to balance keeping the commissioned researcher or organisation on track, answering the research questions and making progress on agreed deliverables, with trusting the researcher or organisation with the appropriate freedom to do their job and complete the work. This will likely involve some form of regular, open communication – perhaps some short (stand-up type) scheduled check-in meetings, a short weekly summary email from the research supplier, and some method of more rapid communication (either via email, or something like Slack). But while the commissioning organisation will need something to assure them that work is progressing, the research provider should also suggest what level of communication and oversight they would find helpful at the kick-off meeting, allowing both partners to agree upfront on their preferred check-in and oversight rhythm and medium. It needs to work for both partners.

More regular catch-ups may be necessary when the project approaches particularly intense periods around milestones. They may also need to be more frequent on larger, longer and more expensive projects.

There may also be a need for some short internal catch-ups within the commissioning organisation during this period, including the research team (or those overseeing the relationship with the supplier) assuring the finance team (or those in charge of paperwork and payment) that the project is progressing as expected.

**Commissioner time and resources**

- Availability of staff for kick-off meetings
- Availability of staff for agreed catch-ups and checkpoints, and to answer ongoing questions
- A template ‘About working with mySociety’ document and links to relevant resources
After the project

Once the commissioned project has been delivered, both partners should organise some form of ‘lessons learned’ session and allow feedback from both sides – without focusing purely on anything that went wrong, causing either or both sides to get defensive. Regular, agreed, open catch-ups during the project, allowing potential problems to be surfaced and solved, should also help avoid this. The commissioning organisation may want to develop a short template lessons learned document to help with this - at the most basic level, this should simply ask what worked well and what could have worked better, but some organisation we spoke to suggested allowing anonymous feedback before a lessons learned session or even editing a collaborative lessons learned document anonymously.

A meeting at the end of the project should also discuss any future opportunities to work together or follow-up work related to the completed project, in line with anything included in the original call for proposals.

Commissioner time and resources

- Availability of staff for lessons learned session
- Availability of staff for maintaining the relationship
- A template for lessons learned session

Next steps

Drawing upon the lessons above, and using the draft commissioning call below, we will pilot our approach in commissioning research as part of our Climate Programme in early 2022.

A draft call for proposals template can be read here, and we plan to iterate based on feedback.

This is likely to be a quick and light version of the process described above, with the opportunity primarily being advertised through mySociety’s existing channels and with as short a process as can be run fairly. We will revisit this document based on our experience.

If you have any questions, comments or further suggestions, please email research-commissioning@mysociety.org.
Annex

Case studies and further reading

Specific calls for proposals we looked at included:

- **Open Data Institute:** Role of regulators, professional bodies and industry bodies in creating the conditions for trustworthy sharing and reuse of data
- **Ada Lovelace Institute:** A co-produced evaluation of the JUST AI fellowship programme
- **Nesta:** Scoping exercise exploring which data the public sector is missing in order to address a specific key challenge, and how it might obtain it (full disclosure the author of this report was awarded the work as part of an Institute for Government bid)
- **ADR UK:** Applications for GRading and Admissions Data for England (GRADE) Research Fellowships

Other organisations’ websites we looked at included:

- **Civic Square**
- **Dark Matter Labs**
- **Esmee Fairbairn**
- **Leverhulme**
- **Lloyds**

Useful reports we were directed to by Pro Bono Economics:

- **Commissioning social research: a good practice guide (Social Research Association)**
- **Commissioning Research (AMRC)**

And finally:

- **Modern Grantmaking**
- Work by others, including Cassie Robinson.

Thanks

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helped spread the word about the project, including Wonk Week at the Social Market Foundation and Tom Watson at The Good Ship.

Research questions for this report

Introductory questions

- How does your organisation use commissioning?
- How frequently do you commission work? What value does that work have?
- How do you decide what to commission and what to keep in-house?
- What sort of work do you commission? How do you think about the different types of work you commission? E.g. literature reviews versus more complex projects
- Do you commission from individuals, organisations or both?
- In broad terms, what does your process look like?

Developing a proposal

- How do you calculate/estimate budgets for the work?
- How do you calculate/estimate timelines for the work?
- What do you include in your proposal? What level of detail? How long is it?
- How did you decide what to include and what not to include?
- What information is essential to include?

Advertising a proposal

- Where and how do you advertise your proposals?
- What other information do you include alongside it?
- How long do you typically advertise it for?
- How many applications do you tend to receive?

Assessing applications

- How do you assess applications?
- How long does it typically take?
- How do you tell successful and unsuccessful applicants about your decision?

Managing the work

- What information do you provide successful applicants to help them work with your organisation?
• How do you strike the right balance between a clear initial brief and flexibility to the emerging results of the research process?
• How do you manage the project?
• How do you ensure the work is fulfilling the initial brief, and what your organisation wants from it?
• How often do you catch up with the commissioned researchers? How do you communicate with them?
• How do you deal with changes in scope or delays to the timeline?

**Completing the work**

• How do you close down/conclude the project?
• Do you hold any sort of retrospective?
• How do you evaluate the outputs?
• How do you ensure lessons are learned for future commissions?
• How do you maintain a relationship with the researcher/organisation once the project has been completed?

**Final questions**

• Is there anything I should have asked you that I haven’t?
• Is there anyone else I should talk to?
• What resources have you found useful?