



Request for Proposal (RFP) to Produce Guidelines for Diverse, Equitable and Inclusive Project Management

1. RFP Background & Objectives

Wellcome is one of the world's leading charitable foundations, politically and financially independent, with an investment portfolio of £29.1 billion. Our investments support our core activities: funding research; campaigns for better science; and public engagement with science and health research. Wellcome works with a wide range of partners around the world, including governments, research funders, non-governmental organisations, charities and commercial organisations, influencing and informing policy to help create the conditions for science to thrive globally and improve human health.

Wellcome has recently launched its new [strategy](#), with a new vision to support science to solve urgent health challenges for all. As Wellcome's work becomes more global with an increasing focus on low- and middle-income countries, we need relevant experience and diverse perspectives to ensure our work is credible and can support Wellcome to achieve its objectives and deliver real impact for individuals and communities.

In light of the new strategy and our increasingly global focus, Wellcome's Policy team and Government Relations / Strategic Partnerships (GRSP) team have been reflecting on where we can improve our work by applying diversity, equity and inclusion principles. We have identified four key thematic areas where improvements could be made:

Workstream	We would like to...
1. Recruitment and representation	Broaden the visibility of our work and opportunities within our teams and adapt recruitment processes to help attract and recruit diverse talent
2. Learning and development	Improve the diversity of professional experience and understanding of D&I among existing staff, including through enhanced training and secondment opportunities
3. Internal team culture and processes	Develop and embed D&I norms into our internal ways of working to set ground rules for how we work and interact as a team
4. External team practices, such as partnerships and events	Embed diverse perspectives, equitable practices, and anti-racist principles into our externally-facing activities (e.g. events, commissioned work, partnership development)



Objectives:

- **Embed project management techniques into our teams.** Currently there is no formalised or structured project management within the Policy/GRSP teams. Having a uniform structure and a set standard will make our work more manageable.
- **Embed inclusive and equitable approaches and practices throughout the project lifecycle.** Too often diverse, equitable and inclusive factors are considered as an after-thought rather than embedded into the foundations of a project.
- Ultimately, use the guidelines to make our work more **structured, impactful and inclusive.**

2. RFP Specification

This section sets out the specification of goods for this RFP exercise. Suppliers should use this section to fully understand Wellcome's requirements and to inform their response.

As part of **workstream 3**, we would like to improve the way we manage and deliver projects to do this in a more informed, diverse and inclusive way. Projects in the Policy team and GRSP team can vary but typically include:

- organising high-level events
- producing policy reports
- running policy campaigns
- mapping government relationships and positions

We want to make sure that, no matter the nature of the project, it is approached, planned, delivered and reviewed in a **diverse, equitable inclusive way**. As such, we would like some **project management guidance** we can refer to before, during and after a project. The guidance may answer questions such as:

- How to set unique D&I objectives per project
- How to track and measure progress to objectives
- How to embed D&I in the project lifecycle from scoping to planning to implementation to reviewing
- How to include the perspectives of those most affected / with lived experience
- How to assess partnership equity and inclusivity in a project
- How to run project meetings in an inclusive way
- What questions should we ask ourselves before making a decision?
- How to understand and share lessons learned at the project close
- How to be actively anti-racist and anti-ableist when delivering a project.



In terms of scope, while the project management guidance can be generic, we would like the guidance to include considerations of projects conducted on an **international context**. This is because our teams frequently work with people outside of the UK, from both high and low income countries, who may be the project partners, project board, project stakeholders or project beneficiaries. The guidance may answer questions such as:

- As an English-speaking institution working in a field (global health) where English is the primary language of business, how can we be more inclusive of those who speak English as a second language or those who do not speak English, when running projects? Similarly, what resource and notice do we need to build-in translation where appropriate, such as for events or publications?
- How can we embed an awareness of cultural differences when planning projects?
- Overall, can we weigh-out the cost/benefits of taking actions to create more inclusive projects?

The ballpark budget for this RfP is approximately £50,000.

3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT	18 June 21
2	Submission of expression of interest to RFP	Supplier	Any point up to 14 July
3	Supplier sends any questions to Wellcome contact	Supplier	Any point up to 16 July
4	Return of Q&A to suppliers	WT	Any point up to 16 July
5	Submission of RFP Response	Supplier	12:00 on 16 July
6	RFP Evaluation Period	WT	19 - 21 July 21
7	Supplier Interviews	WT & Supplier	26 - 28 July 21
9	Notification of Contract Award	WT	29 July 21
10	Contract Negotiation	WT & Supplier	29 – 30 July 21
11	Contract Start Date	WT & Supplier	2 August 21
12	Guidelines delivered	Supplier	By end of September 21

4. Response Format

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



Expression of Interest

Suppliers are asked to submit a short expression of interest by e-mail to the Wellcome Contact in accordance with the RFP timetable.

Supplier Q&A

Prior to the submission of your RFP response, Suppliers are provided the opportunity to submit any questions they have about the exercise. All questions are to be submitted to the Wellcome Contact by e-mail in accordance with the RFP timetable.

RFP Proposal

If you are interested in being considered for this contract, please respond with the following information:

- **Short proposal** outlining how you would approach this piece of work, methodology and why you are best placed to fulfil requirements of RFP (including examples of relevant work).
- A proposed **delivery plan** which will enable you to meet the deliverables and timelines outlined above. This should include details of how and when you will regularly update Wellcome on progress, and any risks associated with the timelines set out.
- **Budget** of the proposed activities costed against the requested deliverables, costed in £GBP
- A brief outline of your approach to **diversity, equity and inclusion** in your work.

Proposals will be assessed against the following criteria:

Methodology	<i>Coverage:</i> how many of the desired questions (as outlined in the specification) will the proposed methodology address? <i>Quality:</i> Is the proposed methodology aligned with our objectives? <i>Utility:</i> Will the proposed methodology deliver the desired, credible and useful results?
Team & Experience	<i>Skills and Experience:</i> Does the applicant have the relevant skills, experience and contextual understanding to deliver this work?
Delivery & Outputs	<i>Communication:</i> Is there a good plan for communication with Wellcome? (Wellcome staff currently working remotely) <i>Delivery plan:</i> Is the proposed delivery plan appropriate and achievable? <i>Feasibility:</i> How feasible is the delivery plan? Are there significant risks associated with the proposed timelines, and how well are they mitigated?
Budget	<i>Value for Money:</i> Is the proposed work within budget and good value for money?



Suppliers are required to submit proposals which also respond to the following sections;

Contract Feedback

This section allows Suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. 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 this [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 8 below).

5. About Wellcome

Wellcome supports science to solve the urgent health challenges facing everyone. We support discovery research into life, health and wellbeing, and we're taking on three worldwide health challenges: mental health, global heating and infectious diseases. Find out more about Wellcome and our work at: wellcome.org.

6. Non-Disclosure and Confidentiality

Prospective Suppliers should be aware that inappropriate publicity could have a serious effect upon Wellcome's business. The information contained within this document or subsequently made available to prospective suppliers is deemed confidential and must not be disclosed without the prior written consent of Wellcome unless required by law.

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

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



8. 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.

9. Funding

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

10. 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.

11. 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.

12. Disability Confident

The Wellcome Trust is proud to be a Disability Confident Employer (DC Level 2) and we encourage all our partners and suppliers to do the same. More information about this can be found on the government website [Disability Confident employer scheme and guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/guidance/disability-confident-employer-scheme-and-guidance). 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.

13. 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.

14. Diversity & 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. 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.

15. Wellcome Contact Details

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

Name: Jack Snow
Role: Team Coordinator
Email: j.snow@wellcome.org