

Request for proposals (RFP):

Discovery research, research synthesis and design of Culture change at Wellcome

1. Summary

Following the launch of Wellcome's new strategy and organisational redesign, we are now ready to design a programme plan to implement organisational wide culture shifts, that will support Wellcome to deliver on our strategy.

We are looking to collaborate with a supplier to codesign a culture change programme plan, which we can begin to implement from October 2022. We would like this programme plan to be informed by:

1. Insight and learning from organisations who have undergone culture change of similar size and scale,
2. Synthesised insight and evidence of where we are as an organisation on our culture change journey,

Which would then inform a:

3. Programme plan to implement organisational wide culture shifts, that will support Wellcome to deliver on our strategy.

The supplier could be a design consultancy organisation or research group, so long as they have the required expertise, partners, and track record in designing organisational change programmes. There is an expectation that the chosen agency will have clear commitments to EDI in and across their work. Further details on requirements are listed in further considerations.

We will also consider collaborative partner bids for delivery on this overall piece.

2. RFP Objectives

The primary objective for this project is to **propose a programme plan to implement initiatives and activities that help us drive our culture shifts.**

We would like this programme plan to be informed by the following secondary objectives:

1. Insight and learning from organisations who have undergone culture change of similar size and scale
2. Synthesised Insight and evidence of where we are as an organisation on our culture change journey

3. RFP Specification

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

Scope of Requirements

The Supplier will provide the outputs as detailed below to support the delivery of the project objectives by meeting the following requirements. These will be developed in line with your proposed methodology:

Workstream	Overview and outputs
Learning from best practice	<p>A piece of research (any format) into how similar sized organisations have implemented major organisational culture change. For example, this could be garnered through case studies, field research etc.</p> <p>From this, we want to get an understanding of what works, and the critical factors to have in place to ensure success in developing and delivering an effective programme to drive culture change.</p> <p>We’d like to see a report covering the above. We’d expect to understand experiences of strengths, challenges, risks and mitigations, which can be fed into the final programme plan.</p>
Insight and evidence synthesis	<p>A synthesis of existing Wellcome data, insight and evidence that surfaces, identifies or alludes to any themes that relate to Wellcome's culture</p> <p>From this, we want a deeper understanding of where Wellcome is on our culture change journey, and to develop the strength of argument and a case for why we will take the approaches, programmes and initiatives proposed in the work below</p> <p>We would like to see a synthesised data report, highlighting the picture to date relating to our organisational culture</p>
Develop a programme plan	<p>A high-level programmatic design of activities and initiatives that we can implement to help us shift our culture to one that will deliver Wellcome’s strategy.</p> <p>From this, we hope to have a clear roadmap of short-, medium- and longer-term goals and their activities, along with clarity on the conditions we need in place to ensure success, based on learnings from 1 and 2 above.</p> <p>Outputs we expect to see are a set of clear recommendations of how to kick start culture change informed specifically by the two pieces</p>

	above, with a stakeholder engagement plan, guidelines and a delivery framework to support implementation
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Out of Scope

Wellcome has a wealth of data from previously conducted insights between 2020 – 2021. Therefore, we expect this piece of work to explore these existing Wellcome insights conducted internally or externally in the last two years, rather than duplicate what already exists. It might be that from the review of our existing data, you identify gaps that need to be addressed. We can discuss this as part of the project plan for this piece of work, however undertaking further significant, large-scale surveys is out of scope.

Key information and considerations

Timelines and timeframes: We are looking to launch our culture change programme from January 2023, so this research and synthesis will need to be completed by end of November at the latest.

Creative and holistic approach to research: We are looking for organisations that can take a creative and holistic approach to research and insights, using mixed methods, with experience of conducting and analysing both qualitative and quantitative data.

We are keen to focus on learning from organisations where culture change has been significant, and EDI is an underpinning ethos and strategy.

Supplier commitments in relation to ED&I: The supplier must include their individual or organisational position/ethos statement that includes a commitment to equality, diversity, and inclusion. This will need to include how the supplier’s ways of working or approach is inclusive and considers a diversity of experience and expertise. This will be considered in the procurement scoring exercise.

4. RFP Background

Overview of Wellcome’s Vision and Strategy

“Wellcome supports science to solve the urgent health challenges facing everyone”

Our strategy

We will achieve this vision in different ways, giving researchers the freedom to make discoveries that change the way we see the world, and using science to find solutions for three of the world’s most urgent health challenges.

We will support a broad programme of [discovery research](#) across a wide range of disciplines with the potential to make important and unanticipated discoveries about life, health and wellbeing – both to help us tackle these great challenges, and to inspire further improvements in human health.

And we're developing programmes of work that draw on Wellcome's expertise across science, innovation and society to deliver ambitious goals:

- [Mental health](#): Working with people who have lived experience of mental health issues to improve research, understanding and treatment of mental health.
- [Infectious disease](#): Working with communities affected by escalating infectious diseases to bring those diseases under control and stop epidemics.
- [Climate and health](#): Working with the communities most affected by climate change to explore the harmful effects of climate change on health, and to use research to develop new ways of protecting people's health.

We are working towards a world in which:

- Significant shifts in understanding lead to improved human health.
- No one is held back by mental health problems.
- Escalating infectious diseases are under control in the communities most affected.
- Climate change does not harm health in the communities it affects most.

[Diversity and inclusion](#), and [research culture](#), are central to our strategy and will be embedded into the work we fund and do.

Where we are now with new Wellcome's culture

In 2019, we ran an Occupational Health Index (OHI) that highlighted areas of transformation that would put us in the best place possible to action Wellcome's Vision. A significant undertaking in 2021, has included the development of a brand new Wellcome Strategy and Organisational Design. In addition, the OHI also highlighted that transformation of the organisational culture would be necessary to deliver on Wellcome's strategy.

A set of five (5) Culture Shifts were designed in 2020, that would look to move away from one state of approaches and behaviours to ones that would better align with the new strategy.

Challenges

With this time sequence of Culture Shifts designed in 2020, a new organisational design in 2021, a series of insights commissioned and carried out by Wellcome since 2020 up to now (from which themes of culture can be seen); and the backdrop of other world events we think that we may need to revisit those 5 culture shifts as they stand.

What we need

In order for us to be able to determine whether we should review the culture shifts, we need to commission the work set out in the scope above that will support Wellcome's key stakeholders and decision makers by being able to take those outputs into account.

5. Additional Documents

The following additional documents will be provided once suppliers submit an expression of interest:

- 5.1 **Contractual feedback sheet** (to be completed by supplier): This document allows providers to provide a response to the proposed contractual agreement specifically calling out any clauses which they desire to amend.
- 5.2 **Wellcome RFP Q&A** (to be completed by supplier): This is your opportunity to ask questions about the RFP exercise as a whole. The Wellcome contact will collate all questions submitted, anonymise and share responses (where appropriate) to all parties within the RFP process.
- 5.3 **Information governance** (to be completed by supplier): Suppliers are asked to complete a Third Party Supplier Risk Assessment (TPSRA) form before the RFP submission deadline for Wellcome to assess how you handle data.
- 5.4 Wellcome's Principles (information for supplier): This document outlines Wellcome's overall principles. These principles set out how we aspire to do things and what we should expect of one another, at every level of the organisation, every day.

6. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT	Tuesday 14 th June 2022
2	Submission of expression of interest to RFP	Supplier	Tuesday 21st June
3	Submission of Supplier Q&A to Wellcome Contact	Supplier	Friday 1 st July
4	Return of Supplier Q&A to Suppliers	WT	Wednesday 6 th July
5	Submission of RFP Response	Supplier	Monday 18 th July
6	RFP Evaluation Period	WT	Monday 18 th – Friday 22 nd July
7	Supplier Presentations	Supplier	Monday 1 st August – Friday 5 th August
8	Notification of Contract Award	WT	Monday 8 th August 2022

9	Contract Negotiation	WT & Supplier	Monday 8 th August – Monday 22 nd August 2022
10	Contract Start Date	WT & Supplier	Monday 22 nd August 2022
11	Contract Completion Date	WT & Supplier	Wednesday 30 th November 2022

Response Format

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

Expression of Interest

Suppliers are asked to submit an email confirming their intention to apply and acknowledge of the timelines set out to Jacqueline Wabara (j.wabara@wellcome.org) by email **by 10:00 on Tuesday 21st June 2022**.

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 Jacqueline Wabara (j.wabara@wellcome.org) by e-mail **by Wednesday 6th July 2022**.

RFP Proposal

Suppliers are required to submit proposals which respond to the following sections:

- **Short proposal** outlining how you would approach this piece of work, methodology (include any foreseen risks) and why you are best placed to fulfil requirements of RFP (including examples of relevant work). **(Max 10 pages OR 20 slides)**.
- **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.
- **Costings of proposed activities** against the requested deliverables in £GBP
- **A brief outline of your approach to diversity, equity, and inclusion** in your work
- **A brief outline of how you plan to comply with GDPR and data protection legislation in your work.**

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 above.

Proposals should be submitted by email to Jacqueline Wabara j.wabara@wellcome.org by **10:00 Monday 18th July**.

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 #	Comment / Issue	Proposed Solution

Suppliers submitting proposals as a registered company should review [This document](#)
 Individuals submitting proposals as a sole trader (not registered) should review [This document](#)

Proposals will be assessed against the following criteria:

Methodology	<ul style="list-style-type: none"> • Coverage: How many of the desired focus areas (as outlined in the specification) will the proposed methodology address? • Quality: Is the proposed methodology rigorous and aligned with our objectives? • Delivering outcomes: Will the proposed methodology deliver the desired results? • Diversity and Inclusion: Are there any diversity, equity and inclusion risks identified in the applicant’s work?
Team and experience	<ul style="list-style-type: none"> • Skills and Experience: Does the applicant have the relevant skills, experience, and contextual understanding to deliver this work? • EDI, perspectives and lived experience: Is there EDI experience across the team? Is there a range of perspectives across the team?
Delivery and outputs	<ul style="list-style-type: none"> • Communication: Is there an effective engagement and communication plan with Wellcome project team? (Wellcome staff work 2 days a week in the office) • Delivery plan: Is the proposed delivery plan appropriate and achievable? • Feasibility: How feasible is the delivery plan? Are there significant risks associated with the proposed timelines, and how well are they mitigated? • Sustainability: Is the approach to delivery viable and sustainable, appropriate and achievable?
Budget	<ul style="list-style-type: none"> • Value for Money: Is the proposed work within budget and good value for money?

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, infectious disease and climate.

We are a politically and financially independent foundation. Find out more about Wellcome and our work: wellcome.org

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.

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.

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.

Funding

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

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.

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.

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. 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.

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.

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.

All options must fit with our [-anti-racism-principles-](#) and anti-ableist principles.

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.

Wellcome Contact Details

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

Name: Jacqueline Wabara
Position: Head of Organisational Culture
Email: j.wabara@wellcome.org