



## Request for Proposal (RFP): Identifying pathways for investment in Climate and Health

### 1. RFP Background & Objectives

Wellcome, in partnership with the Climate Leadership Initiative (CLI), is commissioning a donor-facing report to identify funding strategies that inspire funders to engage with and mobilise action in the climate and health field.

[CLI](#) was created to provide philanthropists with expert guidance and insights into impactful climate solutions. CLI advises new climate funders and engages those with experience to connect with their peers. With a network of trusted, seasoned advisors, world-class climate experts, and funder-ambassadors, CLI is ready to help interested funders get started quickly and effectively.

[Wellcome](#) is a politically and financially independent global charitable foundation. Wellcome aims to improve health for everyone by funding research, leading policy and advocacy campaigns, and building global partnerships. Under our new strategy, we will be supporting [discovery research](#) into life, health, and wellbeing, alongside taking on three worldwide health challenges: [mental health](#), [infectious disease](#), and [climate and health](#).

The global health sector and wider health community are increasingly calling for action on climate. The health of people and our planet are inextricably linked, and [there are many human health benefits](#) that can be achieved through climate action: from changing energy systems, shifting to clean transport and active mobility, protecting nature, and overhauling food systems, to adaptation for resilience. The need for action is becoming more and more apparent as we continue to fall short of our climate ambition, with climate change causing increasing damage, loss, and negative impacts on health.

Media coverage of the [recent IPCC report](#) made much of the health impacts of climate change, a connection many people around the world have felt very immediately through experiencing these impacts in subsequent months. As the report highlights, climate change is already being felt as a health issue. This will continue as temperatures rise, via the spread of infectious diseases, heat-related illness and death, mental health conditions and more.

**While pathways between climate and health are not always direct and there are still gaps in the data sets to be filled, evidence is clear enough on the need to act.** The report we are commissioning will draw on available research and insights from the field and translate these into funding strategies for current and new funders to engage in climate and health.

The purpose of this project is to identify areas where increased funding could have a significant impact on the climate and health field (referred to as 'pathways to action') and specific actions for each pathway that funders can support (referred to as 'solutions'). While the report will include the types of solutions that Wellcome invests in, it will not be limited to this. The report will offer a broader approach in which all potential funders can find points of entry into the climate and health field that correspond with their interests and priorities.

Individuals and teams are invited to submit proposals for this RFP. We are seeking a Supplier with a proven track record of researching climate and/or health funding and philanthropy; experience and networks in the climate and health nexus, including experts and funders; and excellent communication skills required to produce a report that can mobilise action.



## 2. 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.

We are seeking a Supplier to deliver a report identifying funding strategies that inspire donors to engage with and mobilise action in the climate and health field.

Based on a combination of desk research and consultation with experts in the field, the Supplier will identify a handful of areas (pathways) where increased funding could have significant impact on addressing greenhouse gas emissions and/or adapting and building resilience to climate hazards in ways that promote and protect health. For each pathway, they will then identify and vet a set of specific actions that funders can support (solutions), including examples of organisations whose work is aligned with these pathways, as illustrative examples. At least half of these organisations should be based in low- or middle-income countries.

The final output will need to be accessible and speak to both climate and health funders, by avoiding technical jargon from either field and by considering both climate and health metrics, such as emission reductions as well as numbers of lives affected or saved. The Supplier must ensure that equity is a central focus in this work, which should be reflected in the experts they consult and the pathways and indicative solutions/organisations they share.

### a. Stages of proposed work

Based on similar reports commissioned by CLI, we envision this process in three broad stages, though alternative proposals are welcome. Previous reports will be shared with the successful Supplier for reference.

Note that the stages outlined here can be overlapping, rather than sequential, while the steps within them may be sequential.

#### Stage 1: Information gathering and stakeholder consultation

- Conduct a light-touch, rapid review of existing evidence to identify possible pathways to action and inform the stakeholder consultation
- Consult a list of experts jointly agreed by Wellcome and CLI (including funders and non-funders, and ensuring balanced geographic representation) to further understand the best available science and pathways to meaningful action
- Gather expert names and prepare a list (both funders and non-funders) that may be used for later peer review
- Identify 3-5 proposed solutions for each pathway, including example organisations already working in these areas, to be reviewed in stage 3

#### Stage 2: Drafting and iteration

- Prepare a draft report, including options for useful graphics and charts to convey messaging in an accessible way
- Integrate feedback from CLI and Wellcome, both on content and from a communications perspective
- Engage at least 3-5 expert reviewers, as agreed in consultation with Wellcome and CLI, seeking out diversity in terms of geographic representation and subject expertise



- Convene a workshop OR expert review process, as agreed upon by Wellcome and CLI, to get feedback on the proposed strategies and narrative, including how the narrative may need to be adapted for different geographies
- Prepare a final version of the report and an executive summary

### Stage 3: Vetting proposed solutions

- Compile spreadsheet of trusted (those funded by Wellcome and other peers at the intersection of health and climate) and highly promising (those endorsed by others but are not yet being funded by peers) solutions and example organisations for each pathway that have been surfaced during conversations (template to be provided by CLI)
- Select a subset of solutions and example organisations (an estimated 3-5 per pathway, up to a maximum of 15) for vetting based on light research, to ensure they are appropriate to include in the report. This should include checks for good geographic representation (including at least half organisations based in low- or middle-income countries), and include a variety of differently sized organisations and re-granters

Wellcome will lead on recruiting and contracting the Supplier, though both Wellcome and CLI will assess applicants and select the successful Supplier. The Supplier will meet regularly with points of contact in both organisations once in-post and will share drafts with both for feedback. We anticipate delivery of the report to take 3-5 months.

### b. Deliverables

Key deliverables for this RFP include:

- Plan for expert consultation, including a list of experts (funders and non-funders)
- Bibliography of useful resources, as identified in the consultation stage
- Interim report drafts for Wellcome and CLI feedback (minimum 2)
- Draft longlist of climate and health nexus solutions/organisations
- Delivery of expert workshop or alternative expert review process
- Longlist of climate and health nexus solutions/organisations
- Vetting summaries of solutions/organisations, as per CLI-provided template
- Final Wellcome-CLI external facing climate and health report
- Final Wellcome-CLI external facing executive summary

### c. Budget

The available budget for this work is up to £50k.

## 3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT and CLI	25 August 2022
2	Submission of Supplier questions to Wellcome Contact	Supplier	5 September 2022
3	Return of Supplier Q&A to Suppliers and shared on the Wellcome website	WT and CLI	8 September 2022
4	Submission of full RFP Response and completed <u>TPSRA2 form</u>	Supplier	16 September 2022



5	RFP Evaluation Period	WT and CLI	w/c 19 September 2022
6	Supplier presentations for shortlisted Suppliers	Supplier	w/c 26 September 2022
8	Notification of Contract Award	WT	30 September 2022
9	Contract Negotiation	WT & Supplier	Early October 2022
10	Contract Start Date	WT & Supplier	Mid October 2022

#### 4. Response Format

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

##### a. 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 will be collated, anonymised, answered and returned to all suppliers who have submitted questions, as well as uploaded to Wellcome's [contract opportunities website](#). All questions are to be submitted to the Wellcome Contact by e-mail in accordance with the RFP timetable.

##### b. RFP Proposal

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

##### RFP Questions

This section requests responses from Suppliers on specific questions in relation to this RFP exercise.

#	Question	Max.
1	Provide a short proposal outlining how you would approach the work, including identifying relevant experts to consult and potential solutions	750 words
2	Provide a delivery plan outlining the project deliverables and timelines	250 words
3	Outline the proposed project team with a brief description of their relevant experience (please do not include CVs)	250 words
4	Outline your approach to equity, diversity, and inclusion, both in relation to your proposed methodology for the project (including how you will ensure balanced geographic representation in the stakeholders you consult and solutions you identify), and within your organisation	500 words
5	Describe your approach to working closely with relevant points of contact at Wellcome and CLI	250 words
6	What makes you best placed to fulfil the requirements outlined in this RFP? This could include networks, previous	250 words



	experience, etc.	
7	Provide two case studies of where you have successfully provided services similar to those described in this RFP	500 words
8	Provide a detailed budget including breakdown justifying the proposed costs to meet Wellcome's requirements	N/A
9	Outline any major risks and challenges you foresee with meeting the project requirements. Please include your mitigation strategies for these risk and challenges	250 words

Proposals will be assessed against the following criteria:

<b>Methodology (30%)</b>	<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? <i>Equity:</i> Will the proposed methodology ensure equitable practices are followed including diversity of engagement and approach
<b>Team and experience (40%)</b>	<i>Skills and experience:</i> Does the Supplier have the relevant skills, experience, team diversity and networks including in low- and middle-income countries to deliver this work? <i>Subject expertise:</i> Does the Supplier have adequate experience in and knowledge of the climate and health field to meet the requirements of this RFP, including transcending subject-specific silos?
<b>Delivery and outputs (20%)</b>	<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?
<b>Budget (10%)</b>	<i>Value for Money:</i> Does the proposal reflect value for money to deliver our desired outputs?

### Contract Feedback

Suppliers should 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 Wellcome's 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).

### Wellcome's Data Protection Compliance



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 are asked to complete the [TPSRA2](#) assessment before the RFP submission deadline for Wellcome to assess how you handle data.

## **Presentation**

Following submission of your proposal shortlisted supplier(s) will be invited to present via a virtual teams meeting. This meeting will last 60 minutes in total, with 25 minutes for presentation and the remaining for Q&A

## **5. 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.

## **6. 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.

## **7. 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.

## **8. Funding**

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

## **9. 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.

## **10. 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.

## **11. 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/guidance/disability-confident-employer-scheme). 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.

## **12. 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.

## **13. 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.

## **14. Wellcome Contact Details**

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

Name: Erika Loggin  
Role: Senior Officer, Strategic Partnerships



Email: [E.Loggin@wellcome.org](mailto:E.Loggin@wellcome.org)