



## Open call for CEDI Associates:

### Our new advisory function for Culture, Equity, Diversity and Inclusion at Wellcome

#### 1. Overview

Wellcome Trust's [equity, diversity and inclusion \(EDI\) strategy](#) has three bold and ambitious targets, that by 2031 we will be an inclusive employer, an inclusive funder, and ensure that all the activities we fund will be inclusive in design and practice.

In 2022, Wellcome's [Culture, Equity, Diversity and Inclusion](#) (CEDI) team reviewed and reimagined a new advisory function to support the CEDI team in delivering the EDI strategy. We are now ready to bring on board our first cohort of up to 20 CEDI Workstream Associates.

Our new advisory function is designed to focus on learning, centering a culture of relation, transparency and trust between CEDI and Associates. We will be working with an external agency that will convene and facilitate meetings, broker the relationship between CEDI and the Associates, and tend to the wellbeing of relationships between all members.

The sections below outline what the role of a CEDI Workstream Associate entails, the engagement timeline over the year, details of the application process and further background information.

#### 2. The opportunity

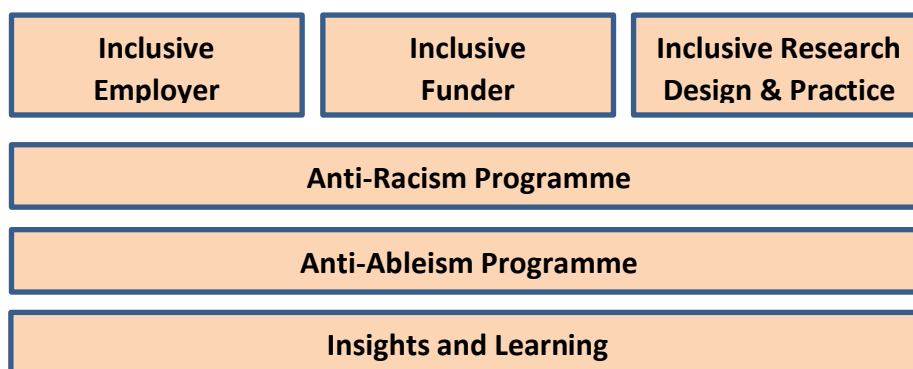
The CEDI team is in its second year of driving the EDI strategy and to ensure that our work is informed by learning and good practice, we believe it is essential to involve practitioners with deep knowledge, skills and experience of driving change, to ensure our work has the best chance of achieving our goals. We aim to onboard our first cohort of Workstream Associates by April 2023, with the first meeting in June 2023.

The type of work we do is wide-ranging; from building an open access [library of equitable practices](#) for addressing funding inequities, to [developing anti-racism principles](#), to making Wellcome an inclusive workplace by implementing the [trans inclusion policy](#). These activities will be strengthened with input from individuals with lived experience as well as those with key skills in centring EDI in similar work.

We are excited by this opportunity to collaborate with and involve practitioners in the scoping, designing and delivery of impactful initiatives to help us make measurable progress on our EDI strategy, and we look forward to the ideas and activities that will emerge over the coming years.

#### Purpose and key objectives of CEDI Workstream Associates

CEDI Workstream Associates will support the delivery of initiatives within one of our key CEDI workstreams: Inclusive Employer, Inclusive Funder, Inclusive Research and Design Practice or, cross-cutting programmes such as Anti-racism, Anti-ableism, and Insights and Learning. Working primarily within the remit of the allocated workstream, Associates will build deep knowledge of the programme of work, the CEDI portfolio and its context within Wellcome.



The key objective of our Associate programme is to support Wellcome’s EDI goals by **strengthening CEDI’s approach to partnership, leadership, and delivery**. Playing roles ranging from consultancy to advisory, Associates will support by:

- Helping CEDI reflect on their work, looking back and looking forward,
- Offering strategic steer on next steps at key milestones at goal and programme level,
- Providing critical feedback in real time on approach and implementation of CEDI projects,
- Feeding into the codesign and development of key activities and initiatives,
- Serving as critical friends and a learning partner to CEDI team,
- Providing an objective lens, putting CEDI work into context as the CEDI workstreams navigate the emerging field and practice of EDI.

CEDI Associates do not take decisions on behalf of Wellcome, but your input, steer and advice will feed into decisions, particularly the design and development of initiatives.

### **Responsibilities and expectations of CEDI Workstream Associates**

CEDI Associates are responsible for providing expertise and contributing to the design and development of CEDI initiatives. The responsibilities of all CEDI Associates are to:

- Be unequivocally anti-racist, anti-ableist and trans inclusive in behaviour and approaches,
- Contribute to the development, establishment and application of a Social Charter for the advisory function,
- Serve as critical friends and learning partners to support CEDI to achieve their goals,
- Inform CEDI team’s approach to EDI by discussing, exploring and sharing examples of good practice,
- Work with Workstream Leads to provide support and guidance on their EDI journey,
- Engage in a reflective, self-evaluative process to improve the Workstream Associate group effectiveness,
- Have an informal and advisory character, with no authority to take binding decisions,
- Raise any concerns or areas to strengthen in relation to EDI practice,
- Notify the Associates’ Convener as soon as practical, if any matter arises which may be deemed to affect the development and input of the Associates,
- Provide at least one-month notice should they decide to leave the programme.

These responsibilities and expectations will be reviewed, iterated and agreed upon with our first cohort of Associates, and we will continue to review them together on a regular basis. We will also



have a Terms of Reference which outlines more detail on the role, responsibilities, key working relationships and expectations, which will be agreed with the group.

### **Membership, meeting frequency and term engagement**

For Phase 1 implementation (2023–2024) will build three CEDI Associate workstreams: (1) Inclusive Employer, (2) Inclusive Funder and (3) Cross-cutting function including Anti-Ableism, Anti-racism and Insights and Learning. Each workstream will consist of between 6 to 8 CEDI Associates, with a maximum of 20 Associates for a one-year term (June 2023 – June 2024). At the end of the first-year term, Associates will have the opportunity to stay on for the second-year term or step down.

Our aim is to have our Associates in place by May 2023, where we will have welcome event, followed by the first quarterly meeting in June. Quarterly meetings will take place every June, September, January and April.

### **CEDI Associate engagement programme**

Over the annual cycle, we will engage with Associates in group convenings, one-on-one interactions, and through project work, along with informal gatherings to build connections and relationships, as outlined below. These activities will be supported by an external agency which will convene and facilitate discussions, along with the CEDI Insights and Learning Team, who oversee the advisory function. Activities include:

Quarterly CEDI workstream meetings: CEDI Associates and CEDI members will come together each quarter for reflective workshops to review progress and look ahead to opportunities for collaboration. Associates are required to attend these meetings as part of their workstream.

Advising individual members of CEDI: CEDI Associates will advise and support CEDI team members mostly on an individual basis and occasionally in small sub-groups, as the need arises, and as agreed at quarterly meetings. This could be support for specific, small pieces of work in an *ad hoc* way, or larger, time-bound projects. The work will be responsive and consist mainly of guidance and project steering. Associates will be engaged on a retainer model that can be scaled based on need and on self-selected interest in the work.

Quarterly CEDI Associates meetings: In addition, all CEDI Associates will be connected and supported as a collective, meeting quarterly to connect, collaborate, share cross-CEDI insights and learning, and explore more strategic or future-focused activities.

The Buddy Programme: This programme creates an opportunity for CEDI and Associates to build relationships, feel connected and committed to the new advisory function, encouraging knowledge sharing and supporting Associates to connect to wider parts of CEDI, building a broader contextual understanding of CEDI's work.

Activities to support network building: Outside of quarterly meetings, the CEDI team and Associates will come together for informal meetups to further build connections and deepen relationships.



### 3. Who we are looking for

We are interested in applicants from a range of sectors (research, academia, funding, philanthropy, government, community engagement *etc.*), working at any scale (local, regional or national).

We are particularly interested in hearing from applicants who have practical experience of informing and especially driving EDI work within organisations. This could be through applying your skills to an initiative aimed to drive social change, *e.g.* applying innovation design skills to an EDI problem, or by working directly on an initiative to improve EDI, *e.g.* developing an EDI training programme for employees.

Applicants can be freelancers, sole contractors or working as part of organisations, provided they can commit to the minimum requirements term engagement requirements outlined above.

In this first phase, we are keen to receive applicants from individuals based in the UK and/or understand the employment and funding landscape in the UK.

#### Skills and experience

Below are our key areas of focus, along with examples of EDI expertise, skills, knowledge and experiences we are interested in. This list is not exhaustive. If your experience looks different to the below, and you think you can bring value as a CEDI Associate; we are keen to hear from you.

Inclusive Employer Workstream	Inclusive Funder Workstream	Cross-cutting Workstreams
<p><b>HR professionals</b></p> <ul style="list-style-type: none"> <li>• HR management and practice</li> <li>• Employee relations</li> <li>• Workplace adjustments and disability</li> <li>• Recruitment</li> <li>• Talent Development</li> </ul> <p><b>Staff development and engagement</b></p> <ul style="list-style-type: none"> <li>• Staff networks</li> <li>• Employee engagement</li> <li>• Staff performance</li> <li>• Career frameworks and progression</li> </ul> <p><b>Organisation behaviour change</b></p> <ul style="list-style-type: none"> <li>• Organisational psychology</li> <li>• Behavioural science</li> </ul>	<p><b>Inclusive funding models</b></p> <ul style="list-style-type: none"> <li>• Design and implementation of inclusive funding models</li> <li>• Practice knowledge of inclusive funding models</li> </ul> <p><b>Inclusive funding practices and grant making</b></p> <ul style="list-style-type: none"> <li>• Cross-sector experience (non-profits, charities, national and international funding agencies, Community-based funding, research and academia)</li> </ul> <p><b>Grant funding decision making</b></p> <ul style="list-style-type: none"> <li>• Influencing senior leaders in funding decisions and funding decision processes</li> </ul>	<p><b>EDI specific knowledge and practical experience in:</b></p> <ul style="list-style-type: none"> <li>• Anti-Racism, critical race theory, white supremacy, anti-oppression</li> <li>• Anti-Ableism, social disability model, Business Improvement,</li> <li>• Intersectional EDI practice knowledge</li> <li>• Disability critical theory (intersection of race-CRT and disability studies)</li> <li>• Disability justice (intersection with other broad social inequality groups)</li> </ul> <p><b>Insights, evidence and learning</b></p>

<ul style="list-style-type: none"> <li>• Learning and training programmes</li> </ul> <p><b>Organisational culture change</b></p> <ul style="list-style-type: none"> <li>• Psychological safety</li> <li>• Application to global work and branding</li> </ul> <p><b>Inclusive leadership and management</b></p> <ul style="list-style-type: none"> <li>• Inclusive decision-making</li> <li>• Inclusive coaching and mentoring</li> </ul> <p><b>EDI Legislation &amp; Equality Law</b></p> <ul style="list-style-type: none"> <li>• Gender reassignment, identity, trans and non-binary rights</li> </ul> <p><b>Policy development, with an EDI lens, some examples include:</b></p> <ul style="list-style-type: none"> <li>• Trans inclusion policy (a high priority for Wellcome)</li> <li>• Family policies</li> <li>• Domestic abuse policy</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitating decision making conversations within funding committees</li> <li>• Behaviour change in decision meetings</li> <li>• Cultural values change in decision making committees</li> <li>• Cross-sector experience (non-profits, charities, national and international funding agencies, Community-based funding, research and academia)</li> </ul> <p><b>Grant applicant experience and accessibility specialists</b></p> <ul style="list-style-type: none"> <li>• Experience with inclusive grant making tools</li> </ul> <p><b>Experts with knowledge of equity in research</b></p> <ul style="list-style-type: none"> <li>• People who have published research about inclusion in the research sector</li> <li>• People who have developed policies to increase inclusion in research</li> </ul>	<ul style="list-style-type: none"> <li>• Monitoring, Evaluation &amp; Learning practice in EDI</li> <li>• Qualitative and Quantitative data equity</li> </ul> <p><b>Social and system Innovation</b></p> <ul style="list-style-type: none"> <li>• Innovative EDI Programme design</li> <li>• People centred design thinking</li> <li>• Developing networks/ communities of practice</li> <li>• Innovation project design</li> <li>• Systems change practice and methodologies</li> <li>• Foresight, futures and horizon scanning</li> </ul> <p><b>Communications and engagement</b></p> <ul style="list-style-type: none"> <li>• Storytelling practice and narrative framing of insights and social change</li> <li>• Communication to influence key stakeholders and decision makers</li> <li>• Communication tools and approaches for different audiences</li> </ul>
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## Key considerations

**Remuneration:** Associates will be offered a day rate of £700.00 inclusive of VAT, along with travel and accommodation expenses. This will include 2 days to prepare for, attend and deliver follow up actions for quarterly meetings (8 days a year), along with an additional 2 days a month (24 days over the year) to support on projects and programmes. This allocation will be agreed with Associates each quarter.

**Principles we are working to:** We have gone through an extensive process to review previous CEDI advisory groups and have designed a comprehensive new function that is centred on relationship building. As part of that work, we have toolkits and recommendations to create conditions for success. We are keen to work with Associates who can go on a learning journey with us as we explore and iterate this process together.



Resources provided by Wellcome: For quarterly workstream meetings and cross-associate meetings, we will aim to use meeting rooms within Wellcome Trust Offices, along with providing lunch and refreshments. If we are unable to use Wellcome Offices, we will find external venues that can meet our requirements.

Centering network development and relationship building: Critical to success of the new model is building a culture of relation and trust between CEDI and Associates. We will be working with Associate Conveners who have knowledge and experience in convening, stewarding, and facilitating individuals as part of a network or collective. These conveners will also help us to review, monitor and iterate the programme.

Applying for Wellcome Contracts in your time as an Associate: Please note that there will be restrictions on CEDI commissions (or Request for Proposals) you can apply for during your time as a CEDI Associate. You must also declare any conflicts of interest (COI) with individuals or organisations you are associated with who may apply to CEDI commissions during your tenure.

#### **4. How to apply**

The application process is in two stages: The first stage is a short online application. Shortlisted applicants will be invited to the second stage, we will be a virtual, informal discussion.

##### **Stage 1: Online application:**

Please follow this [link](#) to access the online CEDI Associates application form where applicants are asked to submit some basic information, along with short answers or a short video or audio (five minute) to the following questions:

1. Which workstream(s) (Inclusive Employer, Inclusive Funder or Cross-cutting) are you applying for?
2. Please tell us a bit about yourself: Your work, your practice, your interest in driving Equity, Diversity and Inclusion, and the journey you have been on to get to this point. You might want to link to websites / social media where we can read more about you on the internet.
3. What knowledge, personal attributes or skills do you possess that you can offer to the benefit of the workstream(s) you have chosen?
4. Using short summaries, provide specific details of up to two different initiatives or projects that you have been directly involved in that is relevant to this role. For each initiative or project, please describe your role (*e.g.*, team leader, team member), the purpose of the activity (*i.e.*, its aims), the major contributions you personally made.

Applications will be reviewed by members of the CEDI team. Applications will be selected based on how well matched the applicant's practical skills and experience are to the selected Workstream.

##### **Stage 2: Informal Discussions with shortlisted applicants**

Shortlisted applicants will be invited to take part in a virtual, informal discussion with the CEDI team. This discussion will last no more than one hour, focus on discussing your application, talking



more about the role, with time for applicants to ask us any questions. These will be conducted by members of respective Workstreams. We will share the questions and structure in advance.

Wellcome is committed to ensuring that our applications are accessible to everyone. If you have a disability or a chronic health condition, or any accessibility needs, we can offer adjustments to the response format *e.g.*, submitting your response in an alternate format. For support during this application process, please email **Kasifa Khalid (k.khalid@wellcome.org)**.

### **Applicant Feedback**

We will be sharing a feedback form with all applicants to understand your experience and learn how the process can be further improved for future recruitment of CEDI Associates.

### **Contract Review**

Wellcome will contract with you as an individual for this engagement. You should review [this document](#) as it will provide a basis from which we contract with you.

Thank you for considering this opportunity and please do share this open call with people who you think might be interested in the role.

## **5. Application Timetable**

#	Activity	Responsibility	Date
1	Launch of open call	WT	Friday 6 January 2023
2	Application submission deadline	Applicant	12pm on Wednesday 15 February 2023
3	Applicant shortlisting, feedback and notification of decision to progress to next stage	WT	Wednesday 15 February 2023 to Friday 10 March 2023
4	Applicant informal discussions	WT	Monday 13 March 2023 to Friday 31 March 2023
5	Notification of Contract Award	WT	Thursday 6 April 2023
6	Contract Negotiation	WT & Applicant	Tuesday 11 April 2023 to Friday 28 April 2023
7	Contract Start Date	WT & Applicant	Tuesday 9 May 2023 onwards

## **6. Further Background**

### **Introduction to CEDI's advisory function**

To ensure that [our strategy](#) is informed by learning and good practice, The Culture, Equity, Diversity and Inclusion team (CEDI) are recruiting advisors and a partner to support the implementation,





convening and facilitation of our new CEDI advisory function. We believe this is an exciting opportunity for EDI practitioners with specific skills, expertise and experience to help Wellcome make measurable progress on our EDI strategy, and an exciting opportunity to take a fresh approach to working with and convening advisors, creating an interaction and engagement programme that is positive and impactful for all involved.

This new CEDI Workstream Associates will engage primarily with the workstream team members as they scope, design and deliver impactful initiatives within these areas.

### Why CEDI works with associates

In line with best practice, the CEDI team believe that we must continually challenge ourselves in how we approach and deliver EDI work if we are going to be effective in driving our outcomes. Although there is no 'rule book' for driving change in EDI, there is an emerging practice. Working with advisors can help us learn from this practice, strengthening our approach and learning.

CEDI has worked with advisors as part of our operating model since 2016. Although we have hugely valued the input from advisors, there is always more we can do to make this a more impactful experience. In 2022 we made a commitment to improving how we work with advisors and worked with [The Liminal Space](#) and [CollaboratEQ](#) to review and redesign our model to one that is more effective for both Wellcome and advisors. We are now putting the new model into practice.

### Our new approach

Our model is an evolution of existing ways Wellcome works with advisors, with an emphasis on building a culture of relation, prioritising skills, knowledge and practical experience of driving organisational change in relation to equity, diversity and inclusion. We will have advisors who engage with us on an ad-hoc basis (Network Associates) as well as those engaged with us over a longer period (Workstream Associates). A key addition is working with an external supplier as our Associate Conveners, delivering the engagement programme, acting as an independent broker and partner, supporting the facilitation, communication and relationship building.

We are moving away from the limiting term of 'advisor' to 'Associates', ensuring CEDI Associates can play a range of roles, from bringing thought leadership and knowledge, to providing practical input and co-designing initiatives. We are testing a blended approach, coming together with Associates at key points throughout the year, with time allocated to feed in on individual projects. For the first stage of implementation, we are recruiting CEDI Workstream Associates.

CEDI Workstream Associates	Associate conveners	CEDI Network Associates
<p><b>16 – 20 Members</b> Skills, knowledge and experience aligned to supporting our three CEDI goals.</p> <p>Onboard for 1 year Meeting quarterly with CEDI team, with capacity to support projects outside of meetings</p>	<p>Skills in brokering relationships, safeguarding, facilitation, communication and trust building</p> <p>Onboard for 2 years Facilitating quarterly meetings, offering direct support to CEDI members and advisors</p>	<p><b>Starting with 10 members</b> Skills, knowledge and experience aligned to our three CEDI goals</p> <p>Form as part of an advisory roster, approached for ad-hoc, one-off requests (x2-3 a year) where we require specific input or expertise</p>





## Spectrum of input and involvement

<b>Co-creation and co-design</b>	Direct input on priority programmes, shaped and designed in collaboration with advisors. Here, advisors play a more hands-on, creative role
<b>Execution</b>	Support on <i>ad hoc</i> pieces of work, where advisors bring new expertise and missing knowledge in the team. This type of work can be outsourced, with agreed outcomes and is slightly less collaborative in style.
<b>Practice advice</b>	Advice on practical topics, which range from micro day-to-day challenges to elements of ongoing operational matters, <i>e.g.</i> , embedding changes, internal communications etc
<b>Strategic advice</b>	Advice on strategic components of planning and execution and items that may impacting the execution and integration of the strategy
<b>Thought leadership</b>	Advice on matters which are future-facing and looking ahead to the long term. Thought Leadership is also proactive and includes bringing awareness regarding important matters to set them up for present and future success.

## Who we are at CEDI

Wellcome Trust's [Culture, Equity, Diversity, and Inclusion](#) (CEDI) team consists of four teams, collectively driving [Wellcome's EDI strategy](#) and our organisational culture shifts. These teams are:

- **The Organisational CEDI team**, leading the Inclusive Employer workstream.
- **The Research and Funding Equity team**, leading the Inclusive Funder and Inclusive Research and Design Practice workstreams.
- **Organisational Culture**, leading the development Wellcome's of organisational culture
- **The CEDI Insights and Learning team**, a cross-cutting enabling function, developing, coordinating, and researching CEDI best practice, using this and data, monitoring and evaluation insights to inform strategic partnerships and programmes that drive CEDI goals.

Anti-Racism and Anti-Ableism are major priorities for Wellcome as these are the areas where we need to make most progress in inclusive employer and inclusive funder work streams.

The [CEDI team consists of 16 individuals](#) working across the three teams above, including our Associate Director of CEDI, Lauren Couch. We work in partnership with internal colleagues and external stakeholders to deliver on Wellcome's EDI strategy. We work in three ways:

- **Lead:** We codevelop initiatives in partnership with key internal and external stakeholders,
- **Advise:** We support stakeholders responsible for establishing EDI programmes by feeding in advice and best practice,
- **Advocate:** We champion the benefits and opportunities that result from EDI within Wellcome and with our external partners.

Examples of the programmes and initiatives we are working on include:

- Codesigning a new funding scheme to support UK Black Researchers
- Developing a staff engagement programme or campaign on Anti-Racism and Anti-Ableism
- Developing and delivering an action plan linked to our gender and ethnicity pay gaps



- Supporting the review of our People Policies
- Delivering and engagement and learning programme for staff on Anti-racism
- Developing new policies and procedures for inclusive decision-making in our funding
- Scanning for emerging practice in EDI
- Developing our narrative/story of change for key programmes Anti-racism and Anti-Ableism
- Triangulating internal insights with best practice to inform future actions

## 7. About Wellcome

Wellcome improves health for everyone by funding research, leading policy and advocacy campaigns, and building global partnerships. Collaborative research that involves a diverse range of people from different fields of interest is key to progress in health science – and to achieving our aim of fostering a healthier, happier, world. We're taking on the biggest health challenges facing humanity – climate and health, infectious disease, and mental health – to find urgent solutions and accelerate preventions. Find out more about Wellcome and our work at: [wellcome.org](https://www.wellcome.org).

## 8. Non-Disclosure and Confidentiality

Prospective applicants 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.

## 9. Independent Proposal

By submission of a proposal, prospective individuals 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 individual or with any competitor.

## 10. Funding

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

## 11. Costs Incurred by Prospective Individuals

It should be noted that this document relates to an Open Call 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.

## 12. 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.

### **13. 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.

### **14. Accessibility**

Wellcome is committed to ensuring that our contract opportunities 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 this open call, contact the Wellcome Contact.

If specific adjustments are required by you which incur additional cost, then outline them clearly within your response. Wellcome is committed to evaluating all applications fairly and will ensure any proposed adjustment costs sit outside the evaluation.

### **15. 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 contract opportunities.

### **16. Wellcome Contact Details**

The single point of contact for all communications is as indicated below:

Name Kasifa Khalid  
Role CEDI Best Practice & Advising Manager  
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