

Request for Proposals (RFP)
for development and facilitation support of infectious disease research and
development (R&D) listening exercise

1. RFP Background

Wellcome is a politically and financially independent charitable foundation. We improve health for everyone by funding research, leading policy and advocacy campaigns, and building global partnerships. In 2020, Wellcome announced our new [strategy](#) to tackle three global health challenges: mental health, infectious disease and the impact of climate change on health.

For **infectious disease**, our vision is for a world in which escalating infectious diseases are under control in the communities most affected over the next 30 years. Core to this is the development of a stronger research and development (R&D) environment that sustainably makes available more appropriate, more affordable, and more accessible vaccines, therapeutics, and diagnostics to the communities that need them in a timely way.

To support this, Wellcome is in the process of setting out a **policy vision for a reformed infectious disease R&D ecosystem** with sustained innovation and equitable access to products at its heart. This vision will set out where we hope the global infectious disease R&D ecosystem could be in 10-20 years, and explore the policy changes needed to enable an ecosystem that is more equitable and accelerates innovation across a variety of infectious diseases.

However, we recognise we don't have all the answers. Therefore, we plan to initially launch a discussion paper in early Spring 2023 and then seek input from a range of global health/R&D stakeholders through a **listening exercise** to be completed during early summer 2023. Based upon this, we will set Wellcome's priorities for future focused policy and advocacy work, setting out these plans – and the change we hope to see from other players in the system – in a final paper by autumn 2023.

In the listening exercise we want to hear from experts from across countries and sectors, including those Wellcome have engaged with in the past, and new voices – with a strong focus on the **countries and communities with the highest burden of infectious disease**. Culture, equity, diversity and inclusion must be core to the listening exercise, ensuring a true range of perspectives are sought, and we create an environment that supports open sharing of views and constructive discussion.

We will be engaging extensively on this work through our existing networks, but we want to anchor the listening exercise in a structured approach that systematically draws written and verbal input from as wide a range of relevant stakeholders as possible. We are open to how to best achieve this within the strict timeframe for delivery, but we envisage that this could comprise a layered approach, making use of a mixture of small side events at existing conferences, bilateral meetings, virtual workshops, focus groups and written submissions.

In this RFP we are seeking a supplier to support us in this listening exercise and bring their own suggestions for how we can comprehensively consult a wide range of stakeholders on

our vision for a reformed infectious disease R&D ecosystem. In this activity the supplier will particularly be working with us to:

- **Gather feedback** on the discussion paper through a variety of in-person, virtual and written methods. We are open to exploring different approaches to this listening exercise
- **Engage with a diverse group of stakeholders**¹ across the R&D ecosystem from a range of sectors, communities and geographies, particularly bringing in voices that represent affected communities
- **Foster an open and inclusive dialogue with participants** which can be maintained beyond the period of the listening exercise, using this as an opportunity to build new relationships
- **Ensure the listening exercise is completed by August 2023** so that we can deliver the final vision paper in the autumn.

2. RFP Specification

2.1 Listening approach

We envisage a layered approach to the listening exercise, using different engagement formats and moments to build feedback over Spring/Summer 2023 and maximise the number of people we hear from.

We are keen to hear suggestions from the supplier on engagement approaches to bring into the listening exercise, but an indicative list of activities we have been considering includes:

- 2-3 side events at existing conferences, focused on socialising content and seeking early input (including the World Health Assembly and BIO Conference)
- 4 thematic virtual meetings based on themes of the core building blocks in the discussion paper, open to a broad group of stakeholders
- 3-4 (TBC based on strategy) invite-only virtual deep dives/focus groups on the discussion paper with a small number of subject-matter experts
- Bilateral meetings with key organisations/stakeholders to seek specific perspectives (this might include groups of Civil Society Organisations, academic bodies, industry representative groups, etc.)
- Online space to enable additional written feedback and to catch additional input from stakeholders that we speak directly with

2.2 Key requirements of supplier

In this RFP we are seeking a supplier to support us in developing and delivering elements of the listening exercise across the following broad buckets. The final scope of activities to be delivered within the timeframe will be agreed with the preferred supplier based on their proposed approach.

¹ Our key stakeholder groups include: policy makers, funders, product developers (eg, the pharmaceutical sector), academia, civil society, advocates, regulators, clinicians. We are also committed to reaching stakeholders in both High Income Countries in the Global North and Low and Middle-Income Countries in the Global South

1. Strategic approach for the listening exercise

- Provide strategic advice to Wellcome on the right balance of activities to elicit a suitably comprehensive and diverse range of responses through the listening exercise as a whole
- Provide strategic advice to Wellcome on how to ensure we reach a truly diverse set of stakeholders, in line with our equity, diversity and inclusion (EDI) policies

2. Planning and delivering listening exercise virtual meetings

- Develop a high-level strategy for the approach to virtual listening exercise events, informed by Wellcome's objectives for the R&D ecosystem project
- Input on most appropriate set up for virtual meetings, particularly developing approaches that will support inclusivity and accessibility in the virtual space. We expect this will include work on meeting format/agenda (e.g. balancing larger open meetings with smaller, more targeted virtual roundtables or focus groups) and advice on language translation.
- Lead planning and design of virtual meetings within the listening exercise, including development of session plans (working closely with Wellcome policy team on questions for sessions), slide decks, session briefs and discussion aids.
- Lead delivery of listening exercise virtual meetings, including chairing and facilitation of sessions.
- Manage note taking at virtual meetings, providing some light-touch analysis of themes that emerge from these discussions
- Develop and manage processes for receiving additional written feedback on the discussion paper from stakeholders after meetings (in liaison with Wellcome digital team), providing light-touch synthesis of the written feedback received

Please note that Wellcome plans to take responsibility for:

- Logistics relating to the virtual meetings, but we plan to work closely with the supplier to ensure set up is appropriate.

3. Supporting listening exercise bilateral and side events

- Wellcome will take responsibility for delivery of side events and bilateral meetings, but we would value input from the supplier into how these opportunities can be used strategically as part of wider listening approach and particulars of how they are run.
- The supplier should also provide support for how we capture feedback at these sessions and integrating this into wider write up of what we have heard through the listening exercise as a whole.

2.3 Virtual meeting approach and cadence

The approach for individual virtual meetings is open for suppliers to propose. However, as our focus is on inclusive listening, we favour interactive workshop-style events. Agendas should make use of tools and formats that support active participation while taking into account the different preferences and communication styles of delegates.

We are open to suggestions on meeting scale and cadence but expect suppliers to consider a mixture of larger open meetings with smaller, more targeted virtual roundtables or focus groups. As a starting point for discussion with the supplier, we suggest something in the region

of 4 broad meetings divided by theme, and a further 3-4 deep-dive sessions. We suggest the thematic meetings to be open to a larger number of stakeholders and deep dives to be more selective, though we are open to recommendations how many delegates can be supported at each event to meet our goals. To meet timelines for the activity, we expect that the broad discussions will take place in early summer and be followed later on by the deep dives, all sessions having been completed by the end of July 2023.

We suggest the broad meetings are themed according to the four 'building blocks' of our discussion paper which are likely to include:

- More equitable and comprehensive R&D priority setting
- Streamlined clinical trial and regulatory approaches
- Strategic scale up of sustainable and geographically diverse manufacturing capacity
- Mechanisms that support affordability of products while incentivising innovation

We would like to work with the supplier to determine the best strategic use of the deeper dive sessions, considering how these could target particularly knotty issues, areas of interconnectivity between themes, and/or regional level priorities.

We expect the supplier to manage and provide resource to cover chairing and facilitation roles at all standalone meetings. Colleagues at Wellcome will join sessions and where appropriate can speak to paper content and support discussions.

2.4 Stakeholder management

Wellcome will be responsible for managing stakeholder engagement for this work, and at a minimum we expect the supplier to provide strategic oversight on development of invitee lists for meetings. However, we are interested in exploring if the supplier can provide additional support to identify stakeholder targets to engage through the listening exercise, particularly helping us to meet our objectives around engagement with new communities.

The majority of stakeholder communications can be managed by Wellcome, including sending of invitations and management of meeting attendance lists. However direct communication between the supplier and delegates may be required from time to time.

Since this a global policy-driven project, we would emphasise the need to ensure meetings support engagement with a diverse and geographically-balanced range of global health and R&D stakeholders. As we are particularly keen to engage with stakeholders in countries and regions most affected by infectious diseases (e.g. sub-Saharan Africa, Southeast Asia), specific focus should be given to bringing stakeholders from these regions into the listening exercise. This will have implications for people's availability due to time zones and we would ask the supplier to factor this in.

It will also be important to engage different sectors (e.g. industry, government representatives, civil society organisations) in a balanced way. Different requirements and preferences of these groups should be considered when developing meeting plans.

2.5 Other requirements

Accessibility is a major priority for these sessions, and we are prepared to allocate additional resource to options that will make the meetings more inclusive. We have particularly identified translation as one opportunity to explore and would be keen for proposals to include thinking

on options for delivery of live translation, how feasible this might be, and the likely budget requirement.

Some subject matter expertise in the field of global health (particularly infectious diseases and/or R&D) is likely to be an asset in order for the supplier to effectively advise on communication approach, facilitate virtual events, and capture the depth and detail of discussions in readouts. We are open to considering alternative methods for bringing in this kind of expertise, such as bringing in additional advisors.

It should also be noted that this list of requirements is not exhaustive and we are open to suppliers suggesting alternative approaches that could help us better achieve the overall objectives for the listening exercise,

3. RFP Timeline

#	Activity	Responsibility	Date
1	RFP issued to Suppliers	Wellcome Trust	22/03/2023
2	Submission of Supplier expression of interest and Q&A to Wellcome Contact	Supplier	31/03/2023
3	Return of Supplier Q&A to Suppliers	Wellcome Trust	03/04/2023
4	Deadline for submission of RFP Response (RFP Proposal) and TPSRA2 form	Supplier	17/04/2023
5	RFP Evaluation	Wellcome Trust	17/04/2023 - 22/04/2023
6	Supplier Presentation	Wellcome Trust & Supplier	25/04/2023 - 28/04/2023
7	Notification of Contract Award	Wellcome Trust	W/C 01/05/2023
8	Contract Negotiation	Wellcome Trust & Supplier	May 2023
9	Contract Start Date	Wellcome Trust & Supplier	May 2023

4. Response Format

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

4.1. Deliverables

We are open to receiving pitches which vary these or other aspects of the delivery of the project, however if varying these deliverables please be explicit that this is your intention and provide reasoning. If you would like to provide an additional cost which would enable you to provide deliverables and an approach closer to that requested, please indicate what the associated cost would be.

Deliverables
Listening exercise high-level strategy paper, including: <ul style="list-style-type: none">• Overall plan for use of different engagement approaches within entire listening phase• Overall plan for virtual meetings approach and cadence, setting out how these will compliment wider listening exercise activities• Options to solicit additional written feedback from stakeholders engaged in standalone sessions• How the approach meets Wellcome's objectives
Strategic advice on stakeholder targets, providing input into Wellcome-led stakeholder lists and stakeholder engagement
Collateral to support virtual meetings, including: <ul style="list-style-type: none">• Slide deck explaining the project• Meeting brief for delegates• Discussion guides• Discussion aids <p>Where collateral is to be shared with stakeholders the supplier should carefully consider accessibility requirements, including design and language options.</p> <p>Detailed resources 2 weeks before each individual meeting</p>
Detailed plans and agenda for each individual meeting 2 weeks before each meeting
Delivery and facilitation of four broad thematic virtual meetings, including responsibility for: <ul style="list-style-type: none">• Chairing and facilitation of discussions both in plenary and in smaller groups• Factors that support accessibility• Note-taking• Establishing mechanisms to receive additional written feedback from stakeholders after meetings
Delivery and facilitation of up to 4 invite only deep dive virtual meetings on key topics, including responsibility for: <ul style="list-style-type: none">• Chairing and facilitation of discussions both in plenary and in smaller groups• Factors that support accessibility• Note-taking

<ul style="list-style-type: none"> Establishing mechanisms to receive additional written feedback from stakeholders after meetings
Write up of meeting discussions including raw notes as well as short meeting reports (max 5 pages) that identify key themes of feedback.
Deliver a project outcomes internal workshop for Wellcome staff

4.2. Expression of Interest

Suppliers are asked to submit a short expression of interest by e-mail to o.williams@wellcome.org in accordance with the RFP timetable, which should contain the following information.

- Confirming whether you are a company or individual, if company please provide Full company name, address, and company registration number.
- A non-binding cost estimate as a single figure in GBP

4.3. 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 and the activity. All questions will be collated, anonymised, answered and returned to all Suppliers who have submitted an expression of interest in the RFP process. Please make sure you ask all questions at this stage. Once Wellcome have responded to all questions If you have any additional questions after this deadline these will not be answered to ensure that this is a fair and equitable process.

4.4. RFP Proposal

A proposal for undertaking the work should be **no more than 7 pages**. Suppliers are required to submit proposals which respond to the following sections:

#	Question	Max Pages
1	Explanation of your approach and how this will meet the aims and objectives of this project and the required deliverables. Please also indicate if there are different options that could be added or removed from the approach to provide different levels of support.	3
2	Description of anticipated risks and challenges and ways to mitigate them.	1
3	Details of staff allocated to the project, together with experience of the contractor and staff members in carrying out similar projects and expertise in the thematic areas of this project. The project manager/lead contact should be identified	2
4	A timeline for the work, including key milestones and deliverables against each of these.	0.5
5	A detailed budget including all costs, expenses and VAT, specifying all day rates of individuals involved, the allocation of days between members of the team, and the cost of particular activities. Budget detail could be sent as a separate document/appendix to the proposal.	0.5

4.5. Proposal scoring

Proposals will be assessed against the following criteria:

Methodology	To what extent does the RFP response demonstrate a clear understanding of the aim and objectives of this project?	20%
Experience	To what extent does the RFP response demonstrate experience relevant to conducting the listening exercise, considering capability in running inclusive and interactive meetings with global stakeholders?	20%
Delivery & Outputs	To what extent does the tender response demonstrate a clear and realistic project plan, to successfully deliver the work to the timetable required and a well-structured, inclusive in membership team with clear roles and responsibilities? To what extent is the proposed approach robust and appropriate to fulfil the project aims and provide appropriate deliverables?	40%
Budget	To what extent are costs realistic and appropriate relative to the proposed approach?	20%

5. 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 proposal submission deadline for Wellcome to assess how you handle data.

6. 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.

7. 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.

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

Before the RFP response deadline, Prospective Suppliers must make the RFP 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.

9. 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.

10. Funding

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

11. 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.

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). 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 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 RFP 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.

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 RFP processes.

16. RFP Contact Details

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

Name: Oliver Williams
Role: Senior Policy Adviser, Wellcome Trust
Email: o.williams@wellcome.org