

**Request for Proposal (RFP) for Convening Community Engagement International
Partners and
Creating Evaluation and Impact Management Approach for Community Engagement**

1. Summary and objectives

Wellcome supports science to solve the urgent health challenges facing everyone. Through its work, Wellcome aims to enable the broadest possible range of people to contribute to, and benefit from, science's potential to change the world. Thus, alongside our investments in science, we support engagement with the public across the research lifecycle, to get the best out of science for society.

This RFP is issued by the Community Engagement (CE) team. Our work in CE is directed towards addressing Wellcome's three top-priority health challenges – mental health, escalating infectious diseases, and climate and health – as well as our ongoing discovery research, through creating trusted relationships with affected communities and amplifying people's voices, actions and perspectives to enable collective change.

Wellcome funds research focusing on where the health needs are greatest, particularly lower and middle-income countries. This includes five major Africa and Asia Programmes (AAPs), based in Malawi, Kenya, South Africa, Vietnam, and Thailand, with field sites and satellite operations in a number of additional countries, as well as a range of other international programmes. Each of these organisations carries out an extensive programme of scientific research, and each has a significant CE programme to support, inform, and deepen the impact of this research. The CE team supports this CE work.

This RFP is intended to deliver a programme of work that will strengthen the connection between Wellcome and the community engagement functions of our international partners, whilst strengthening their capacity to evaluate the impact of CE work. Overall, we expect this work to support Wellcome's international programmes to advance their long-term strategies for CE, by helping all parties understand the potential opportunities across Wellcome's Health Challenges and by ensuring our partners are better able to capture, share, and act on evidence of the impact of their community engagement.

This is necessary to be able to shape and increase the impact of future CE; to demonstrate with communities the impact of their contributions; and to make the case internally and in the wider sector for the importance of engaging affected communities. As a result of this work we hope that CE receives the focus and resources it needs to be genuinely effective. This is particularly important for our international programmes, which tend to be at the forefront of the drive for CE as a vital part of scientific research within their regions. We also envision this work as creating a resource that could be adapted and used by the wider community engagement sector.

This programme of work comprises two parts:

- 1) Working with Wellcome and its international programmes (including the AAPs, the Kenya-based Science for Africa, and one other programme to be determined at the start of the contract) to co-develop an evaluation framework to effectively monitor and evaluate the impact of community engagement programmes, and
- 2) Designing and facilitating a multi-day event at Wellcome's London office that will co-develop several strategic pieces of work with the community engagement teams from Wellcome's AAPs and key international programmes, potentially including more international programmes than those involved in part 1, and bring them closer to Wellcome's new strategy and structure.

The budget range for this work is £150,000 – 180,000 including VAT.

2. RFP Objectives

- **Objective 1:** Conduct a rapid assessment of current methods of evaluating the impact of community engagement among selected Wellcome partners (these will include the AAPs, Science for Africa, and a programme TBD) and the ways it is currently used.
- **Objective 2:** Identify several leading methodologies used to evaluate the impact of community engagement programmes in the international non-profit sector and assess the strengths and weaknesses of these methods.
- **Objective 3:** Facilitate and guide a working group of Wellcome staff and international partners (including representatives from the AAPs, Science for Africa, and one other partner to be determined) to create an evaluation framework for CE, to fit with the AAPs research evaluation framework under development by Wellcome.
- **Objective 4:** Co-design (with Wellcome and partners) and facilitate a five-day event for international partner community engagement staff, Wellcome staff, and selected external partners.

3. RFP Specification

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

Scope of Requirements

This programme of work comprises two parts:

Firstly, co-design an impact evaluation framework that our partners can use to effectively monitor and evaluate the impact of community engagement programmes, and produce a strong evidence base around this impact. This framework will be based on the Core Ingredients, a set of standards previously developed by Wellcome and the AAPs, and on the findings of the [Realist Review of the Evidence Base of Community Engagement with Research](#).

Quality of the framework:

- Measure impact at the programme and institutional level in a consistent way. We are keen for this to be beyond the funder's investment alone.

- Capture the direct/ contributory impact of community engagement work, including its impact in co-developing research agendas with communities; informing research; and helping to strengthen research uptake (including the ways in which research is used to shape advocacy).
- Capture the reach of community engagement among vulnerable populations (and be able to be tailored to the specific vulnerable populations in a particular context – for example, based on geography, gender, or indigenous status).
- Capture the role of community engagement work in building trusted relationships with communities affected by health challenges and strengthening the capacity of communities to take an active role in research, and how this underpinning way of working is needed to build trust and mutual benefit for research and communities, as per findings of the REAL Review.
- Measure the benefit of community engagement work to the communities (for example, through empowering community members or driving change).
- Reflect the metrics communities themselves would use to measure success, and/or allow flexibility for individual partners to adapt the framework to build these metrics in.
- Provide a highly adaptable model/set of models of community engagement evaluation that is transdisciplinary and participatory in its approach, and that can be used across and advance the conversation within the health and development sector.

Utility of the framework:

- Be adaptable enough to respond to the specific context and needs of each of Wellcome’s international programmes, as well as to be taken up by other international community engagement programmes beyond Wellcome’s grantees.
- Provide actionable insights that can inform the future design and balance of their community engagement programmes and the way CE is incorporated into their research strategies, and the need for mechanisms that underpin engagement with communities.
- By providing evidence of impact of effective community engagement, enable our partners to unlock investment from other sources.
- Enable Wellcome to learn from and evidence the value of CE and its contribution to communities and to research.
- Fit with and complement the new evidence framework Wellcome is developing for the impact of the AAPs’ research programmes.

Secondly, design and facilitate an enjoyable and energising five-day event at Wellcome’s London office (provisionally planned for January/February 2024), bringing together the community engagement leads of the AAPs, Science for Africa, and selected international programmes with Wellcome staff and selected external partners. This event should:

- Enable community engagement teams of Wellcome’s international programmes to develop a closer understanding of Wellcome’s new strategy and the medium-term direction of the Health Challenges.

- Provide an opportunity to build relationships and new touchpoints across other teams in Wellcome, especially with policy and strategic partnership teams, data for science and health, translation and portfolio integration and campaigns.
- Enable international programmes to reflect and explore opportunities for their work in relation to the health challenges over the short and medium term.
- Help catalyse the development and implementation of the evaluation framework.
- Engage with new Wellcome CE initiatives such as the Centres for Exchange.
- Allow us to agree how we want to collaborate and convene together in future and for what purposes.

Methodology and Deliverables

Design an effective methodology that enable us to collaborate as virtual partners in effective ways. This might include:

For objective 1:

1. Design a methodology that enables the supplier to understand the current ways in which the selected international programmes currently evaluate and understand the impact of their CE programmes, and how this understanding influences their organisation-wide research strategies.
2. Review the current ways that evidence and impact of CE is used, including but not limited to international programmes' annual reports, case studies, academic literature and other grey publications as appropriate.
3. Establish the key evaluation challenges faced by the CE teams that this framework and impact management approach could address. Not limited to:
 - a. Many impact approaches are from the perspective of the funder's investment alone and not the wider impacts that this investment has had in mobilising other resources and community assets.
 - b. Similarly, many impact management approaches are aimed at justifying funder investment and not measuring what is important to CE and communities more broadly.
 - c. Other challenges may appear due to the way that CE is often funded as a project within research proposals, which makes it harder to maintain and foster long-term community relationships, which the REAL review found to be essential for effective engagement.
4. Understand Wellcome's strategy and establish the value and ways we can support international programmes' community engagement evaluation approach, and how we can use this evidence base internally and externally with other strategic partners and funders.
5. The methodology should respond to the needs and preferences of the selected international programme staff and should also meet the accessibility requirements contained in Wellcome's Inclusive Meetings Guidelines.

Deliverables: **Workshops and assets** that show how each of the AAPs, Science for Africa, and selected other international programmes currently evaluates their CE work, including:

- Strengths, challenges and missed opportunities
- How current community engagement evaluation and impact management approaches are shaped by the requirements of funders (including and beyond the Wellcome Trust)
- What evidence is currently captured and how this supports both the future design and plans of their overall programme and how this enables them to demonstrate value to communities and to research and to make the case for further investment
- How the current approach to evaluating CE fits within the organisation's wider evaluation of its work
- A set of recommendations that evaluation and impact management will need to address in future to meet the summary and objectives of this RFP

For objective 2:

1. Identify 3-5 leading good practice methodologies for evaluating the impact of public and/or community engagement programmes developed and/or used by INGOs in the international health or development sectors. These should include at least two methodologies for evaluating the impact of engagement with affected communities. Ideally, these methodologies should currently be used in a variety of geographies.
2. Produce an assessment of the selected methodologies. The assessment should include:
 - a. How each methodology works, what it measures and how
 - b. Strengths and weaknesses
 - c. Whether and how each methodology enables communities/programme participants to shape, lead, and/or contribute to the evaluation.
 - d. How adaptable each methodology is to specific contexts
 - e. Where applicable, any examples of the methodology being used and lessons learned from these examples
 - f. Its utility in meeting the evaluation and impact needs of our international programmes.

Deliverables: **Assessment of 3-5 methodologies** used by relevant INGOs and their relevance for the design of this evaluation and impact approach.

For objective 3:

1. Establish a structure and ways of working with a small working group from Wellcome and partners to co-develop evaluation framework. The methodology should include ways for us to collaborate together and in asynchronous ways. We expect the supplier to do this in ways that encourage honest dialogue with the full participation of all members, while also not placing an undue strain on the capacity of partner staff.
2. Sense-check the draft framework at key touchpoints with selected Wellcome staff, within and outside the CE team, in order to ensure that it meets Wellcome's needs and that it fits with the Core Ingredients and Wellcome's broader evaluation systems, particularly the evaluation system for the AAPs' research programmes that is currently under development.
3. Select, prepare, and support at least one of the international partner CE programmes to conduct a time-limited rapid test of the evaluation framework to evaluate (a subset of) its current CE activities.

4. Based on the learnings from this test, refine and finalise the framework with the working group.
5. Develop an accessible and easy-to-understand guide that covers how to use the framework, and how to adapt it to different contexts (geographical, cultural, and project). This element will draw on Wellcome's context-mapping tools for CE, currently in development.

Deliverables: Intuitive, easy-to-use, and adaptable **CE impact evaluation framework**; accessible **guide** to using and adapting the evaluation framework.

For objective 4:

1. Understand the role that the planned event will play in the context of our evolving relationship with the community engagement teams of our international programmes, and what Wellcome needs from the event.
2. Review the results of the recent rapid test of convening options and priorities Wellcome conducted with the AAP CE leads.
3. Follow up with AAP and selected international partner CE leads as needed to fully understand their needs and priorities.
4. With Wellcome's CE team and the AAP and international partner CE leads, co-develop an agenda for a five-day workshop in early 2024 (dates TBD). In ways that meet the scope of the requirements, we expect this event to be energising, equitable and open.
5. Facilitate the five-day workshop in person.
6. Follow up the workshop with a summary paper that captures the primary learnings and lays out a way forward for Wellcome's strategic work with the AAPs and international partners.

Deliverables: **Facilitated event** with international programme and Wellcome staff and external guests; **post-event summary paper** summarising key learnings and next steps.

4. RFP Background

Wellcome's strategy underlines that to have the greatest possible impact on human health, we need to enable the broadest range of people to contribute to, and benefit from, science's potential to change the world. To achieve success in addressing the health challenges and meet our diversity and inclusion ambitions as an inclusive funder, we must involve communities and minoritized groups meaningfully in designing and implementing the work. Wellcome's Community Engagement work aims to make sure that the right solutions are produced through health research, that these solutions are taken up by those who need them, and that they have the desired impact.

We work with communities most affected by the health challenges in three key ways throughout the research cycle:

- **Community conversations and building agendas for health research**, helping to ensure that research responds to people's aspirations and hope for creating resilient and healthy communities and ensures that science reaches those most in need.
- **Augmenting scientific knowledge** through community- and context-specific input to address knowledge gaps and to be transdisciplinary in approach.

- **Enabling communities to play a core role** alongside policy, industry and media in creating impact through science.

Underpinning this, we **build trust, relationships, and capacity for working well with communities** in testing and developing solutions to health challenges.

Through the Realist Review of the Evidence Base of Community Engagement with Research, we know that engagement activities are crucial to supporting research outcomes by improving the ethics of research; facilitating the successful execution of research; and improving the impact/outcomes of research. These findings have shaped Wellcome's Core Ingredients, a set of principles for core funding of community engagement.

Our AAPs and international programmes are driven by the major health problems in their areas, and aim to train and support the next generation of researchers and research leaders within their regions across Africa and Asia.

As Wellcome's public and community engagement work around its three health challenge areas – climate and health, infectious disease, and mental health – scales up, our partnership model with our international programmes is also evolving in order to facilitate their role as a core part of Wellcome's new strategy. The AAP and international programme CE teams have identified a need to get closer to Wellcome's strategy, structure, and direction, particularly around the health challenges and Wellcome's Discovery Research work (an ongoing programme that sits outside the three health challenges).

In addition, we aim to strengthen our international programmes' capacity and our CE partnerships with them by supporting their CE teams to more flexibly align with Wellcome's strategy; to amplify the voices of the communities they work with more broadly via Wellcome's platforms; and to build the evidence base for the impact of their CE work.

5. RFP Timetable

	Activity	Responsibility	Date
	RFP issue to Suppliers	WT	7 June
	Submission of expression of interest and supplier Q&A to Wellcome Contact	Supplier	26 June
	Return of Supplier Q&A to Suppliers	WT	4 July
	Submission of RFP Response	Supplier	28 July
	RFP Evaluation Period	WT	1-11 August
	Supplier Presentations	Supplier	w/c 21 August
	Notification of Contract Award	WT	5 September

0	Contract Negotiation	WT & Supplier	5-30 September
1	Contract Start Date	WT & Supplier	1 October
2	Contract Completion Date	WT & Supplier	1 April 2025

6. Response Format

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

Expression of Interest

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

The EOI should include:

- the legal name of the Supplier (company or individual(s))
- company number
- company address
- preferred currency for payment
- a statement of intention to submit a full proposal
- a list of any questions the Supplier has about the procurement exercise and project

(see Supplier Q&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 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. All questions are to be submitted to the Wellcome Contact g.bladon@wellcome.org by e-mail by 26 June. Answers will be returned to Suppliers by COB on 4 July.

RFP Proposal

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

Contract Feedback

This section allows Suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. Contract feedback is to be incorporated into your proposal as an annex and in the following format:

Clause #	Issue	Proposed Solution/Comment

Suppliers submitting proposals as a registered company should review this [document](#).
 Individuals submitting proposals as a sole trader (not registered) should review this [document](#).
 Individuals submitting proposals through their own personal services company please highlight this to the Wellcome contact immediately (see point 9 below).

Information Governance

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. Successful suppliers will be asked to complete the [TPSRA2](#) assessment before attending presentation so that Wellcome to assess how you handle data.

RFP Questions

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

#	Question	Max
1	Outline your approach for delivering the activities and objective 1, 2, 3, and 4 of this RFP. Please include: <ul style="list-style-type: none"> • Methodology that will be used for assessment of AAP/international partner methods of evaluation • Methodology that will be used for assessment of good practice evaluation methods • Your intended approach to facilitating the co-creation of the framework • Your intended approach to designing and facilitating the event • How these will meet the outcomes we are seeking • Your track record • Any key challenges or limitations you foresee 	3000
2	Outline your stages and timeframes in which you propose to meet the requirements.	500
3	How can you demonstrate that you have knowledge and experience of MEL methodologies in relevant international sector(s), as well as experience facilitating co-creation with stakeholders from the global South in an inclusive, collaborative, and equitable way? How can you demonstrate your ability to deeply understand and develop approaches to suit the different contexts in which the various international programme CE teams operate?	550

4	Please consider Wellcome's Diversity and Inclusion principles (Section 15) and <u>Anti-racism principles</u> , and outline how this is reflected in your proposal.	500
5	Provide a cost proposal excluding VAT, which details and justifies the proposed costs to meet our requirements. NOTE: This cost proposal should include your facilitation and your travel to London for the workshop, but should not include any other costs associated with the event (venue, catering, attendee travel, etc.). Wellcome will arrange and cover these separately.	1 page
6	Highlight to us any risks you foresee with meeting Wellcome's requirements and describe your approach to risk management.	500
7	Please provide 2-3 examples of previous work where you have successfully completed a similar project.	500
8	Please outline the knowledge and experience of the team members who will be conducting the work.	100 per team member

Proposals will be assessed against the following criteria:

Methodology	<p><i>Coverage:</i> How well are the desired focus areas (as outlined in the specification) covered in the proposed methodology address?</p> <p><i>Quality:</i> Is the proposed methodology aligned with our needs?</p> <p><i>Utility:</i> Will the proposed methodology deliver the desired, credible, and useful results?</p>
Experience	<p><i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?</p>
Delivery & Outputs	<p><i>Communication:</i> Is there a good plan for communicating with the Wellcome team?</p> <p><i>Delivery plan:</i> Is the proposed delivery plan appropriate and achievable?</p> <p><i>Feasibility:</i> How feasible is the delivery plan? Are there significant risks associated with the proposed timelines, and how well are they mitigated?</p>
Budget	<p><i>Value for Money:</i> Is the proposed work within budget and good value for money?</p>

Supplier Presentations

Following submission of the proposal, those prospective suppliers who are shortlisted will be invited to a virtual meeting with an interview panel. This will last 50 minutes in total. Suppliers will be asked to give a PowerPoint presentation, followed by question and answer session.

7. About Wellcome

Wellcome exists to improve health by helping great ideas to thrive. We support researchers, we take on big health challenges, we campaign for better science, and we help everyone get involved with science and health research. We are a politically and financially independent foundation. Find out more about Wellcome and our work: wellcome.ac.uk.

8. 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.

9. 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.

10. 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.

11. Funding

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

12. 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.

13. 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.

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 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.

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. Wellcome Contact Details

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

Name: Georgia Bladon

Role: Senior Funding and Partnerships Manager, Community Engagement

Email: g.bladon@wellcome.org