

## Request for Proposals (RFP) for climate finance adviser

### 1. About Wellcome Climate and Health

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[Wellcome](#) is a politically and financially independent global charitable foundation. We 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](#).

Wellcome's climate and health programme seeks to significantly increase our understanding of the effects of climate change on human health and define the interventions and policies that can respond to the climate crisis in a way that protects and improves human health. Our longer-term policy and advocacy priorities seek to maximise the research and evidence synthesised in the climate and health space, to encourage uptake and impact through goal-driven engagement with policymakers, national bodies, healthcare sector, industry partners, communities and the public.

The Climate and Health Policy team, together with our Strategic Partnership team, is seeking a supplier with dedicated expertise in climate financing to help support Wellcome build its policy narrative in this space, support senior representatives to engage in financing discussions, identify entry points within the global dialogue, and scope through partners where Wellcome could best add its voice.

### 2. RFP specification

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We are seeking an independent climate finance adviser to assist on an ad hoc basis in the following ways:

- Undertake economic analysis to develop policy position that presents health arguments for increasing scale and access to climate finance by developing countries and/or promote healthier adaptation and mitigation projects
- Review draft documents prepared by Wellcome staff or external suppliers, presenting health evidence to bolster key climate finance asks.
- Develop actionable resources for advocacy (e.g data visualisation, communication materials)
- Participate in internal planning and discussion sessions, providing a technical climate finance lens to discussions
- Provide advice and make recommendations where Wellcome can best amplify others' efforts in climate financing space

We expect the adviser to be able to contribute flexibly, as and when needs arise from the team, and expect to require assistance for 20- 30 days (not necessarily as 'full' days) over an initial period of 6 months.

### 3. RFP Proposal

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If you are interested in being considered for this contract, please respond with the following information:

- Brief proposal detailing:

- Description of climate finance expertise, with specific focus on global financing mechanisms and institutions, such as multilateral development banks and multilateral climate funds. (300 words max)
- Details of previous independent advisory roles undertaken and why you're best placed to deliver this assignment (300 words max)
- Outline of hourly costings/day rate – recorded in £GBP
- Confirmation of availability, or any periods of unavailability, from November 2023 – July 2024.
- Any specific feedback on the contractual agreement.

Proposals will be assessed against the following criteria:

**Methodology  
(20%)**

*Coverage:* How well are the desired focus areas (as outlined in the specification) covered in the proposed methodology address?

*Quality:* Is the proposed methodology aligned with our needs?

*Utility:* Will the proposed methodology deliver the desired, credible, and useful results?

**Experience  
(40%)**

*Skills and Experience:* Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?

**Delivery & Approach  
(20%)**

*Communication:* Is there a good plan for collaborating/co-creating with Wellcome's internal teams and external stakeholders?

*Delivery plan and feasibility:* Is the proposed delivery plan appropriate, feasible and achievable? Are there significant risks associated with the proposed timelines, and how well are they mitigated?

*DEI:* How well does the supplier embed Equality, Diversity and Inclusion across its ways of working and proposal? Does it have a diverse team involved?

**Value for Money  
(20%)**

*VfM:* Is the proposed work within budget and good value for money?

**4. Preferred timetable**

Activity	Responsibility	Date
RFP issued to Suppliers <a href="#">Contract Opportunities</a> webpage	Wellcome	W/C 16 October 2023
Submission of Questions received from interested Suppliers	Suppliers	23 October 2023
Return of Supplier Q & A to supplier and published on <a href="#">Contract Opportunities</a> webpage	Wellcome	27 October 2023
Submission of Full RFP Response	Suppliers	1 November 2023
RFP Evaluation and Interview Period	Wellcome	1 – 15 November 2023

Notification of Contract Award	Wellcome	17 November 2023
Contract Negotiation	Wellcome & Supplier	20 -24 November 2023
Contract Start Date	Wellcome & Supplier	28 November 2023

## **5. Contractual information and T&Cs**

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Due to the volume of responses expected from this RFP, Wellcome is not able to enter into negotiations with Suppliers over amendments to our standard terms and conditions. Please only submit a proposal if you know you can or have confirmed that your host organisation can agree to these conditions.

Suppliers submitting proposals who are registered companies 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 6 below)

## **6. Prospective Suppliers Personnel - IR35 and Off Payroll Working Rules**

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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. Wellcome contact information**

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

Name: Arthy Hartwell  
Role: Climate and Health Policy Lead  
Email: [a.hartwell@wellcome.org](mailto:a.hartwell@wellcome.org)

## **Annex A – Further information**

### **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 will be asked to complete the [TPSRA2](#) assessment at a later stage to assess the handling of data.

### **Evaluation**

Wellcome will notify all suppliers who have been unsuccessful (Wellcome will not normally be able to provide feedback). Shortlisted suppliers might be invited to attend a presentation.

### **Interview**

Following submission of your proposal, selected shortlisted supplier(s) might be invited to present via a virtual teams meeting to clarify potential questions.

## **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. 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.

## **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. 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.

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](#) (D&I) 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. We want to cultivate an inclusive and diverse culture, and 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.