



Request for Proposal (RFP) for Support for Strategy & Programme Office review

1. RFP Background & Objectives

We are seeking to appoint a supplier to coordinate and facilitate a process to review the function, structure and ways of working of Wellcome's Strategy & Programme Office. They will capture clear and concise outputs with recommendations for change, securing buy in from key stakeholders through the process.

2. RFP Specification

This section sets out the specification of services for this RFP exercise. Suppliers should use this section to fully understand Wellcome's requirements and to inform their response. Wellcome will be guided by the supplier as to what is a reasonable budget for this activity as we do not want to limit ambition or innovation.

Overview

The Strategy & Programme Office (S&PO) was established in September 2021 as a new function for Wellcome. Over the last two years we have built the team and developed ways of working. With a leadership transition, this is the right moment to review and refine how the team is working so that we are as effective as possible.

We are looking for deep facilitation skills to devise and deliver a process that brings together insights from:

- Chief Strategy Officer (CSO), the member of the Executive Leadership Team (ELT) responsible for this area and lead for this process.
- Associate Director, Transition and Legacy (AD T&L), who will support in the absence of AD, S&PO.
- The S&PO leadership team.
- Important internal stakeholders, including an advisory group, while minimising time taken and consultation.

We are seeking a supplier with strong analytical skills and clarity of thought to ensure that we clearly articulate the challenges and identify pragmatic solutions. The supplier must be able to capture ideas clearly and concisely in writing.

Experience of working with funding organisations and programme management functions is desirable.

Approach and timescales

The supplier will work closely with the CSO and AD T&L to shape and steer the project. CSO and AD T&L will engage throughout; represent the work to ensure senior buy-in; and own the outputs.

The supplier will work collaboratively but with significant autonomy to devise and deliver a process that creates buy-in with other stakeholders, including the S&PO leadership team.



We have already done a significant amount of evidence-gathering to inform phase 1. Members of the S&PO leadership team can work closely on specific parts of phase 2, working with the supplier.

The project will run from March - May 2024. We envisage this will be delivered by an individual or a small team working two-three days a week.

Phase 1: problem definition & vision-setting

Outcome and deliverables

1. Create and document a shared understanding of issues to be addressed for PMO to be highly effective, as well as what is already working well (mid-March 2024)
2. Craft a vision of what it looks like for PMO working at its best (mid-March 2024)
3. Develop and agree plan for phase 2: we envisage two parallel workstreams to identify the changes needed (end March 2024)

Approach

- Distil existing insights and input from CSO and AD, T&L
- Workshop with S&PO leadership team
- Test findings with advisory group

Phase 2a: redefining ways of working

Outcome and deliverables (indicative as list to be finalised in phase 1; to be delivered April & May)

1. Redefine team roles and responsibilities
2. Redefine interfaces and dependencies with other enabling functions
3. Identify quick wins on ways of working that can be implemented immediately
4. Develop an implementation plan to ensure new roles and responsibilities “stick” for the team and are widely understood
5. Develop criteria for allocating cross-Wellcome PM resource
6. Any other actions identified in phase 1

Approach

- Supplier to manage programme of work
- Individual work packages to be delegated to S&PO leadership team, with supplier oversight
- Test solutions with advisory group

Phase 2b: redefining the operating model and team structure

Outcome and deliverables

1. Support process with CSO and AD T&L to refresh target operating model and detailed team structure. This will include redefining roles and responsibilities as needed, including AD, S&PO, but not developing job descriptions (Design complete end-April)

Approach

- Developed in close consultation with CSO, AD, T&L and People Partners
- Model to be tested on ELT stakeholders
- Supplier will be responsible for design, not implementation



3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issued on Contract Opportunities webpage	Wellcome	12/01/2024
2	Submission of Supplier Q&A	Supplier	19/01/2024
3	Return of Supplier Q&A to Suppliers	Wellcome	25/01/2024
4	Submission of RFP Response (in line with requirements set out in section 5)	Supplier	7/02/2024
5	RFP Evaluation Period	Wellcome	8-16/02/2024
6	Supplier Presentations	Supplier	4 w/c 19/02/2024
7	Notification of Contract Award	Wellcome	22/02/2024
8	Contract Finalisation	Wellcome & Supplier	Early March 2024
9	Contract Start Date	Wellcome & Supplier	Early March 2024

4. Response Format

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

Supplier Q&A

Suppliers are asked to submit questions by e-mail to the Wellcome contact in accordance with the RFP timetable, which should contain the following information:

- Confirming whether you are / aren't intending on submitting a full proposal
- Confirming whether you are submitting a proposal as a registered company or an individual
- If an organisation please provide registered name, address, and registration number
- A non-binding cost estimate as a single figure in GBP
- Ask any questions you have relating to this RFP

Prior to the submission of your full proposal to the RFP, 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.



5. RFP Response

Suppliers are asked to respond to the following questions as part of their RFP Response:

- Methodology
 - The proposal should demonstrate a clear understanding of the RFP objectives and the intended outcome and how the proposed approach will deliver these.
 - A detailed methodology you will use to conduct the work, including your approach to delivery and collaboration with the Wellcome team.
- Project team and experience
 - Team, including allocation of roles if relevant
 - Evidence that demonstrates experience in this type of work, and experience
 - Outline your experience in the area and how you will work with experts (both Wellcome appointed and others) to cover the gaps in your knowledge.
- Timings
 - Detailed breakdown of Deliverables - Outline of what the anticipated deliverables, including interim deliverables, will be and in what format you'll present these findings.
- EDI
 - How would you ensure equity, diversity and inclusion considerations are embedded throughout the planning, development and delivery of the project?
- Budget
 - Provide your cost proposal for each phase based upon the requirements set out within this procurement exercise setting out:
 - Cost breakdown (excluding VAT or any local taxes including all costs (specifying all day rates of individuals involved, the allocation of days between members of the team, and the cost of activities.)
 - Supporting justification of the financials
- Risk management and quality assurance
 - Describe anticipated risks and challenges and ways to mitigate them and quality assurance for your work.

Proposals can be submitted in PowerPoint, word or pdf format and **should be a maximum of 10 pages**, excluding references.



Evaluation Criteria

During the RFP evaluation period the evaluation panel will independently evaluate your proposal against the criteria outlined below. All scores will be collated, discussed and a decision will be agreed on who progresses to the next stage of the procurement exercise.

Criteria	Detail	%
Methodology	<i>Coverage:</i> How well are the desired focus areas (as outlined in the specification) covered in the proposed methodology address? <i>Quality:</i> Is the proposed methodology aligned with our needs? <i>Utility:</i> Will the proposed methodology deliver the desired, credible, and useful results?	20%
Experience	<i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?	20%
Delivery & Outputs	<i>Communication and collaboration:</i> Is there a good plan for working with the Wellcome team and key stakeholders? <i>Delivery plan:</i> Is the proposed delivery plan appropriate and achievable? <i>Feasibility:</i> How feasible is the delivery plan? Are there significant risks associated with the proposed timelines, and how well are they mitigated? <i>Quality:</i> How will the approach ensure well-written, high-quality outputs?	20%
Budget	<i>Value for Money:</i> Is the proposed work within your budget and good value for money?	20%
EDI	<i>Equity, Diversity & Inclusion:</i> Do they have EDI policies and are these being put into practice in the proposal?	20%
Total:		100%

Contracting

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 organisation can agree to these terms and conditions.

Suppliers submitting proposals as a registered company should review Wellcome's Standard terms and Conditions [document](#).

Individuals submitting proposals as a sole trader (not registered) should review this [document](#).

Individuals submitting proposals through their own personal services company please highlight this to the Wellcome contact immediately (see point 8 below).



Information Governance

Wellcome is committed to upholding data protection principles and protecting your information. The [Wellcome privacy webpage](#) explains how, and on what legal basis, we collect, store, and use personal information about you. This includes any information you provide in relation to this proposal.

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 presentation deadline for Wellcome to assess how you handle data.

Supplier Presentations

Following a submission of the proposal successful proposals will invited to a virtual meeting which will last 50 minutes in total and will be a PowerPoint presentation followed by questions and answers session.

6. About Wellcome

Wellcome is a global charitable foundation established in 1936. Through our work we support science to solve the urgent health issues facing everyone. We fund [curiosity-driven research](#), and we're taking on three of the biggest health challenges facing humanity – [climate change](#), [infectious disease](#) and [mental health](#). We also work with policy makers, run advocacy campaigns, and form partnerships with other organisations to ensure everyone, everywhere benefits from advances in health science. Find out more about Wellcome and our work at: wellcome.org.

7. 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.



8. Equity, Diversity and Inclusion

Embracing equity, [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. 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 equity, 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.

9. 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.

10. Accessibility

Wellcome is committed to ensuring that our RFP exercises are accessible to everyone. If you have a disability or a long term 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.

11. 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.

12. Funding

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



13. 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.

14. 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.

15. Wellcome Contact Details

The point of contact for this RFP exercise is indicated below:

Name: Hala Marr
Pronouns: She / her
Role: EA to Chief Strategy Officer
Email: h.marr@wellcome.org