



Request for Proposal (RFP) for Learning and Evidencing Partner for Centres for Exchange

1. RFP Background & Objectives

1.1 Introduction

This Request for Proposals is issued by Wellcome Trust's Community Engagement team.

Wellcome Trust's vision is to create a healthier future for everyone. Wellcome aims to do this by supporting research that creates equitable and accessible solutions for all.

The Community Engagement team focusses on those communities disproportionately affected by health challenges, and those least likely to benefit from health research, in strategically agreed countries. We work across Wellcome's strategic priorities to understand the most pressing and impactful opportunities to integrate community engagement towards Wellcome's mission by:

- Advising on the integration of most affected communities up-, mid-, and downstream, of health research;
- Developing and supporting programmes of engagement through equitable partnership working and funding models;
- Drawing upon and strengthening infrastructures for learning and influence in Community Engagement. This includes our [Major International Programmes](#) (MIPs), [MESH](#) Community Engagement Network and strategic delivery partners.

As detailed in the [Realist Review of the Evidence Base of Community Engagement](#) we know that authentic and effective knowledge generation with communities requires an investment in building relationships within places and trusted, reciprocal links to communities and local partners. In 2022, Wellcome began to explore this directly through scoping an initiative we have called 'Centres for Exchange'.

Centres for Exchange (CfE) is a collaborative learning and design project, led by the Community Engagement team, that aims to rethink knowledge exchange with communities in health research. The overarching goal for Centres for Exchange is to support diverse communities to play a meaningful, inclusive and reciprocal role in the research ecosystem to ensure that research is responsive to local socio-political contexts and needs. The motivation for the Centres for Exchange work stems from a widespread acknowledgement of the long-standing and historically shaped power inequalities that structure health research as well as the need for research to be more engaged, equitable and impactful.

Over the last year, we have been collaborating with an external organisation to scope this concept - to co-design, conceptualise and deliver a framework which [rethinks knowledge exchange](#) with communities in health research. More detail about this phase of the project can be found [here](#).



1.2 Next Phase

Following the work carried out over the last year, we are moving into a phase of seed funding for organisations and adaptive learning (referred to as Proof of Concept phase), to test and learn more about the potential in the Centres for Exchange approach. We will be funding 8-9 community-based organisations in Kenya, South Africa and India as the 'Proofs of Concept' in this next phase of the work.

As we enter this phase, we are seeking a **Learning and Evidencing Partner** to lead on and co-develop aspects of the learning and evidencing approach over the next 24 months which we refer to as the Learning Agenda. To achieve this, we welcome a range of emergent and iterative approaches that goes beyond standard Monitoring, Evaluation, and Learning metrics and practice and include creative approaches which can include but not limited to, flexible and adaptive learning, participatory approaches, creative mixed-methods approaches and which foster a culture of reflection and iteration, and narrative storytelling.

This Learning Agenda will be delivered through deep collaboration with a number of partners, as detailed in 1.3 below.

The Learning Agenda has four overarching aims:

1. Develop and implement learning processes for each of the Proof of Concept organisations. Each will create a plan for scaling, trialling, and learning from different approaches to community engagement referring to the CfE [strategies](#) which can support equitable and impactful knowledge exchange between communities and health researchers.
2. Facilitate a Learning Network across the Proof of Concept organisations, Wellcome teams, other actors / stakeholders / practitioners working on equitable knowledge exchange that will build connection and future momentum in embedding key learning from across the Network into health research.
3. Iteratively and systematically capture, analyse and translate learning across the Proof of Concept organisations, the Learning Network, Wellcome, and other potential stakeholders such as other funders and the CfE advisory group.
4. Summarise and apply learning into the longer-term plans for the Centres for Exchange model and approaches for Wellcome, by engaging with the Community Engagement team and other Wellcome colleagues in understanding how this work contributes to Wellcome's ambitions in engagement and health equity.

This Learning Agenda is instrumental for the adaptive management process that the Proof of Concept organisations will follow in developing their funded projects, and to evidence the Centres for Exchange approach to Wellcome and other key stakeholders.

1.3 Partnerships

We have sought to work in close collaboration with experts through this first phase of the work and to share learning 'in the open' through workshops, events and published communications. We expect this next phase to continue to require significant work with a



range of stakeholders to deliver on the Learning Agenda. Some of these key relationships will include, but are not limited to:

- Wellcome’s CfE team and key Wellcome colleagues.
- Proof of Concept organisation teams in India, South Africa and Kenya.
- A Network Facilitator* to be commissioned later in 2024 to ensure learning is meaningfully translated and shared.

*The Learning and Evidencing Partner will work in close collaboration with a **Network Facilitator**, who we will commission to support knowledge sharing across Proof of Concept organisations and facilitate a wider community of practice, led from the Global South (the Request for Proposals for this work will go live in July 2024). In doing so, the Network Facilitator will create opportunities for productive and equitable knowledge exchange. We will expect the Learning and Evidencing Partner (this RFP) to work closely with the Network Facilitator to integrate and deliver on shared aspects of the Learning Agenda. This may include, sharing learning frameworks to other community organisations and evidencing the value of network engagement to influence wider systems change.

2. RFP Specification

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

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2.1 Objectives of the work

The Learning Agenda objectives are organised around 3 phases of activity:

Phase	Objectives
<p>Phase 1:</p> <p>Discovering CfE and co-developing learning</p>	<p>Understand the Centres for Exchange framework to gain a deeper understanding of the programme of work and the learning that has come through the scoping phase.</p> <p>Review Wellcome’s Community Engagement team approach and context, including the portfolio of work and relevant historical investments.</p> <p>Get to know and develop ways of working with relevant stakeholders which are inclusive of local socio-political contexts, needs, and practices.</p> <p>Co-develop individual learning plans with each Proof of Concept organisation which will allow them to evidence practice against the CfE strategies.</p>



	This will feed into a co-developed Learning Framework for this work which will capture learning with relevant stakeholders and can be implemented to shape the direction of learning over the next phase of work.
Phase 2: Capturing learning and evidence	<p>Lead the coordination of learning and evidencing processes and activities with all stakeholders under the Learning Framework.</p> <p>Create approaches that allow for reliable capture of evidence and learning by stakeholders to ensure their related work can be responsive, iterative and agile.</p> <p>Facilitate learning activities/events across Wellcome, with Proof of Concept organisations, and other stakeholders involved in learning, in partnership with the Network Facilitator, to ensure knowledge is shared across the network of programme stakeholders, as well as contributing to a wider body of learning.</p>
Phase 3: Synthesizing and sharing learning	<p>Synthesize learning to share evidence from the Proof of Concept phase. This should include enabling factors, barriers and impact from this phase of CfE to inform future planning of the approach at Wellcome and provide Proof of Concept organisations with relevant learning for their strategic development.</p> <p>Promote and enable cross-stakeholder and cross-sector knowledge exchange by disseminating synthesized learning that evidences how the CfE approach impacts productive and ethical knowledge exchange.</p> <p>Based on the learning and insights from this work, create recommendations on how funders and other key stakeholders might respond (e.g. through funding and influencing).</p>

2.2 Approach and ways of working

The supplier is expected to use a combination of approaches to deliver this Learning Agenda. We would anticipate that the following ways of working are woven into the supplier methodology.

Please note that this list is not exhaustive, and we are open to considering additional methods proposed by suppliers that align with the requirements of the Request for Proposal (RFP).

- Working with multiple stakeholders including the Wellcome team, Network Facilitator and Proof of Concept organisations to co-develop and co-design an iterative and agile Learning Agenda that is reviewed at each phase.
- Consultations with key Wellcome staff to understand and leverage the value add of Centres for Exchange to Wellcome in supporting Wellcome's overall strategy and mission by supporting cross-cutting agendas such as health equity, inclusive



research practice, research engagement, research culture, research funding, inclusive communications and our strategic approach to global and local partnerships.

- Consultation with different communities of interest to understand the value-add of the Centres for Exchange approach to their work. For example, Proof of Concept organisations, other local stakeholders in India, South Africa, and Kenya and Wellcome teams.
- Working with each Proof of Concept organisation to propose and agree a learning plan around the approach we are funding, ensuring a diversity of lived and learned experiences are included in the learning and evidence approach.
- Designing agile learning and creative approaches and evidence gathering skills, which may include training for Proof of Concept teams if required.
- Facilitating knowledge sharing and knowledge exchange workshops with Proof of Concept organisations through a variety of media. Enabling knowledge sharing between and across Proof of Concept organisations
- Ensuring equitable, ethical and inclusive and accessible approaches are embedded across all aspects of the work and throughout the duration of this contract. Please refer to the Centres for Exchange [principles](#) which are set in the [CfE framework](#).
- Creating accessible formats for different stakeholders to engage in learning from this work to ensure access to information can be equitably and transparently shared with consideration to local contexts (i.e. translation, data storage security, data access, format, connectivity).
- Engaging in transparent, responsive, and timely communication throughout the duration of the project with the Wellcome Community Engagement team to ensure programme objectives will be fulfilled through an open and collaborative approach.

2.3 Deliverables

We expect the following deliverables from this work.

Phase	Deliverable
Phase 1	<p>A delivery plan including review cycles.</p> <p>Establish relationships and co-create a ways of working document for all stakeholders involved in learning.</p> <p>To co-develop individual learning plans with each Proof of Concept organisation which support them to evidence and share their approach to Community Engagement in alignment to CfE strategies.</p> <p>This phase should conclude with an agreed Learning Framework encompassing approaches for each Proof of Concept Organisation with draft set of learning questions and approach that allows for iterative learning for the described groups, resourcing, governance and process that focuses on leveraging the value of CfE strategies and concept.</p>
Phase 2	<p>Leading the delivery of a schedule of learning and engagement activities as agreed in Phase 1.</p>



	<p>Implementing learning and evidence capture with Proof of Concept organisations and regularly create and share a range of outputs which share best practice of CfE strategies, learning and impact of Proof of Concepts and the Learning Network in creative formats which are accessible to various stakeholders in all locations.</p>
<p>Phase 3</p>	<p>Share learning and evidence summaries which can be used at Wellcome in informing the development and case for this work in future.</p> <p>Develop accessible, innovative, and robust outputs which disseminate learning to different stakeholders. This could include creating public communications which disseminate the work and/or convening knowledge sharing events.</p> <p>A range of reports or other outputs as agreed with Wellcome, (e.g. workshops) which synthesise learning to support Wellcome (and as appropriate other funders/key stakeholders) to create funding and influencing approaches which are responsive to context.</p>

2.4 Requirements for Learning and Evidencing Partner

We seek a supplier with the following desirable experience and expertise:

- Expertise in various emergent and iterative learning methods and approaches.
- Understanding and experience of Community Engagement theory and practice, participatory approaches, and multi-stakeholder processes.
- Demonstrable commitment and application of Centres for Exchange values and principles in work practices.
- Appreciation and understanding of the insights and outcomes of the previous phase of work and journey undertaken, with a keenness to identify opportunities to build upon the existing foundations and leverage these insights and outputs for further project development.
- Demonstrated experience of running global learning processes in Global South contexts on complex issues, ideally related to research and health.
- An organisational culture that is equitable, diverse and inclusive, and able to resource a diverse, multicultural team for this project.
- Experience and understanding of co-design, co-creation, equitable, and inclusive design principles with Global South stakeholders e.g. policy makers, community organisations, NGOs, academics, civil organisations.
- Experience of sustained multi-stakeholder engagement in multiple geographical settings.
- Strong understanding and previous application of various approaches to evidence building.
- Commitment to global health equity.
- Ability to synthesise and present information across large, complex, international programmes of work in a concise, accessible, and engaging way that is appropriate for varying socio-cultural contexts.
- Ability to use and generate creative and innovative mixed-media approaches to learning and reporting back.



- Experience creating creative and accessible learning resources and materials
- Prepared to work closely with Wellcome to develop and implement learning in an agile and collaborative way.

2.5 Timeline and budget

To achieve these aims, we are seeking an experienced supplier working in multiple geographies, with a demonstrated track record of equitable, accessible, and inclusive working practices to apply authentic co-design and collaborative methodologies to all aspects of this learning.

The supplier will have the required expertise, partners, and track record to undertake this work, and as such this RFP is open to consultancy organisations and/or research groups who meet that criterion.

We expect the work to commence in late 2024 and to run over 24 months to the end 2026. The budget available for this work is **£300,000-400,000 (including any applicable taxes)**.

3. Eligibility

The team and leadership of this project should include experts with experience in working in the Global South and who also bring an understanding of the work of and priorities within Global North funders such as Wellcome. It would be beneficial if team members have demonstrable experience in knowledge exchange in health research in the Global South.

4. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT	Wednesday 26 th June 2024
2	Submission of RFP Expression of Interest	Supplier	Wednesday 10 th July 2024
3	Submission of Supplier Q&A to Wellcome contact	Supplier	Wednesday 10 th July 2024
4	Return of Supplier Q&A to suppliers	WT	Friday 19 th July 2024
5	Submission of RFP Response	Supplier	Wednesday 26 th July 2024
6	RFP Evaluation period	WT	29 th July 2024 – 5 th August 2024
7	Supplier presentations	Supplier	27 th August 2024
8	Notification of contract award	WT	Friday 6 th September 2024



9	Contract Negotiation	WT & Supplier	September/October 2024
10	Contract Start Date	WT & Supplier	November 2024
11	Contract End Date	WT & Supplier	End 2026

5. Response Format

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

5.1 Expression of Interest

Suppliers are required to submit a short expression of interest by email to the Wellcome contact in accordance with the RFP timetable, which should include the following information.

- The legal name of the supplier (organisation or individual(s))
- If an organisation please provide the registered name, address, and registration number.
- company address
- A non-binding cost estimate as a single figure in GBP
- 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).

5.2 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.

Submitting an EOI/Q&A is not a binding commitment to submit a full proposal should your organisational priorities change, you will not then be penalised for future opportunities. All questions are to be submitted to the Wellcome Contact by e-mail in accordance with the RFP timetable.

Prior to the submission of your RFP response, suppliers are provided the opportunity to submit any questions they have about this Request for Proposal. All questions are to be submitted via the Expression of Interest form and/or to the Wellcome Contact by e-mail in accordance with the RFP timetable. Please note the final date for question enquires is Wednesday 10th July. All questions and corresponding responses will then be shared to interested suppliers on Friday 19th July.



5.3 RFP Response

Suppliers are required to submit proposals which respond to the following questions

RFP Questions

#	Question	Max Words
1	<p>Outline your approach for delivering the activities and objectives of this RFP. Please include:</p> <p>Methods you will be using and learning approaches you will be using.</p> <p>Stages and timeframes in which you propose to meet the requirements.</p> <p>Provide a potential timeline which includes points for review.</p>	1500
2	Provide a cost proposal excluding VAT, which details and justifies the proposed costs to meet our requirements.	250
3	Highlight risk and challenges you foresee with meeting Wellcome's requirements and describe how you would mitigate for the risks identified; this should include approach to engaging individuals across geographical locations and cultural contexts.	250
4	A track record and expertise of doing similar work. Provide 2-3 case studies of where you have been able to successfully deliver outputs similar to those of this RFP, include links to outputs.	500
5	Please outline how would you embed the CfE principles and values in all aspects of this work.	500
6	Please consider Wellcome's EDI principles (Section 15) and Anti-racism principles, and outline how this is reflected in all aspects of your proposal.	500
7	Describe the project their team, role and responsibilities, how the team will be managed and how each role will be equitably compensated.	500



Evaluation Criteria:

Methodology	<p><i>Coverage:</i> How many of the desired focus areas (as outlined in the specification) will the proposed methodology address?</p> <p><i>Quality:</i> Is the proposed methodology aligned with our objectives?</p> <p><i>Utility:</i> Will the proposed methodology deliver the desired, credible, and useful results?</p>	40%
Team and experience	<p><i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?</p> <p><i>EDI, perspectives and lived experience:</i> Is there EDI experience across the team? Is there a range of perspectives across the team? (this should also be about how the organisation practices not just perspectives/experience)</p>	25%
Delivery and outputs	<p><i>Communication:</i> Is there an effective engagement and communication with Wellcome partners?</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> <p><i>Sustainability:</i> Is the approach to delivery viable and sustainable, appropriate, and achievable?</p>	25%
Accessibility	<p>All our content should be WCAG 2.2. AAA compliant. Any documents being provided to Wellcome must pass accessibility requirements. If you are unable to produce accessible documents, budget must be set aside to employ a suitable agency to do this work. *</p>	N/A
Budget	<p><i>Value for Money:</i> Is the proposed work within budget and good value for money?</p>	10%

Contract Feedback

This section allows Suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. This is the suppliers' opportunity to provide negotiation points on Wellcome's terms and conditions.

Clause #	Issue	Proposed Solution/Comment

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 6 below).

Data Protection

Wellcome is committed to upholding data protection principles and protecting your information. The [Wellcome privacy statement](#) 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 UK 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 UK [GDPR article 30](#) requirements.

Suppliers will be asked to complete the [TPSRA2](#) assessment before presentation stage 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 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.

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 [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 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 \(www.gov.uk\)](http://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 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.

All our content should be WCAG 2.2. AAA compliant. Any documents being provided to Wellcome must pass accessibility requirements. If you are unable to produce accessible documents, budget must be set aside to employ a suitable agency to do this work.

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. Environmental sustainability

Wellcome is playing its part tackling the climate crisis through its mission-driven Climate & Health strategic programme.

In addition, our [Sustainability programme](#) aims to address the environmental impacts and carbon emissions of our activities and operations.

Our suppliers have a key part to play delivering on our sustainability ambitions.

We expect all our suppliers to take active steps to:

- Address their environmental impacts, for instance as part of a certified Environmental Management System.
- Reduce the carbon emissions of their products and services, for instance by adopting Science-Based targets and plans to deliver them.
- Embed environmental considerations in the sourcing and delivery of goods and services to Wellcome, across all stages of their life cycle.

15. Wellcome Contact Details

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

Name: Ruwa Mahdi

Pronouns: she/her

Role: Participation Officer

Email: r.mahdi@wellcome.org

AND/OR

Name: Gemma O'Brien

Pronouns: she/her

Role: Graduate Trainee



Email: g.o'brien@wellcome.org

Appendix

- The Centres for Exchange Learning Repository is an open website which captures the learning journey of the Centre's for Exchange project to date. This includes [key insights](#) from the landscaping research, comprehensive understanding and information detailing the [concept](#), principles vision and goals of Centres for Exchange and the [CfE strategies](#) which will be explored in practice in the next phase of this work.
- A collection of [Blog Posts](#) which share emerging insights from the first phase of Centre's for Exchange.