



## Request for Proposal (RFP): Coordination of Climate and Health Funders' Coalition

### 1. RFP Background & Objectives

Wellcome, in partnership with The Rockefeller Foundation, are seeking a supplier to set up and coordinate a Climate and Health (C&H) funders' coalition, to bring together philanthropy and other funders to strengthen collaboration as a catalyst for urgent action.

Since 1913, The Rockefeller Foundation has pursued our mission to promote the well-being of humanity around the world by breaking down the barriers that limit who can be healthy, empowered, nourished, well off, secure, and free. To do so, the Foundation and its partners have made big bets that bettered the lives of billions of people and transformed the world's public health, agriculture, and renewable energy systems.

[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](#).

The health of people and our planet are inextricably linked. The global funding community must now consider new ways of working together to match the urgency of the climate crisis and its impacts on health. There are a growing number of funders moving into C&H and therefore a need to bring together philanthropy and other funders to better coordinate and collaborate at scale to ensure timely action as a catalyst for better health now and in the future.

We are seeking a Supplier to establish a funders' coalition which will serve as a platform to promote holistic ways of working within the funding community, connecting philanthropic, multilateral, public, private, and other types of funders, to organize action on specific challenges in C&H that require cooperation across sectors. The Supplier will act as a thought partner and co-creator as the funders' coalition evolves, as well as crucially delivering the pilot phase as described below.

Individuals, teams, and consortia are invited to submit proposals for this RFP. We are seeking a Supplier with a proven track record of:

- Standing up funders' coalitions and/or funder forums or collaboratives;
- Strengthening philanthropic coordination to leverage investments and increase impact;
- Understanding the landscape of funders already active or interested in the intersections of climate and health, with expertise in engaging funders and climate-vulnerable communities based in the Global South;
- Excellent facilitation skills required to build bring senior stakeholders from the funding community together to tackle challenges and identify opportunities and shared resources for action.

We are specifically seeking a Supplier who can bring diverse geographic expertise and awareness of the philanthropic funding landscape beyond the US and UK. This may include, for example, geographically dispersed teams, formal advisory mechanisms, or collaborations with organisations based in the Global South.



## 2. RFP Specification

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

We are seeking a Supplier to create a funders' coalition to strengthen communication, coordination, collaboration and to facilitate convergence among C&H funders (further details below). This document sets out the proposed 18-month pilot stage for this coalition, funded by Wellcome and Rockefeller, during which time the Supplier will explore the value and feasibility of this model. Following the pilot, another funder or Wellcome may wish to continue supporting this work, in which case there may be the possibility of extending the Supplier's contract either with Wellcome or a third party.

The priority focus areas for the coalition will be:

- **Communication:** Ensure funders are aware of existing C&H funding commitments and those on the horizon, throughout the duration of the initiative. Identify points of connectivity, promote relationships between aligned and complementary partners, and facilitate learning from successes and failures across communities.
- **Coordination:** Reduce duplication of efforts while promoting opportunities to work in adjacent spaces towards shared objectives. Facilitate alignment and opportunities for new participants in the space across fields and institutions.
- **Collaboration:** Leverage partnerships for transformative co-investment opportunities. Ensure scarce resources are used to their catalytic potential.
- **Convergence:** Identify and address shared challenges across the community and convene stakeholders to take explicit, collaborative action required to enable the field's long-term success. Leverage intellectual, administrative, and financial resources across the community to advance shared needs.

This will be the first initiative of its kind in the climate and health space, so we are looking to Suppliers to propose, based on their expertise, models that can best deliver on the above ambition, and to provide strategic guidance to Wellcome and Rockefeller. This includes a specific focus on best practice for integrating the perspectives of climate vulnerable communities and engaging with funders based in the Global South.

### a. Stages of proposed work

We anticipate the below activities taking place over the course of the 18-month pilot phase, concluding after COP30 in 2025. Note that the stages outlined here can be overlapping, rather than sequential, while the steps within them may be sequential:

#### Stage 1: Philanthropy strategy group facilitation

- Set up and facilitate a philanthropic strategy group with the first meeting around New York Climate Week and UNGA, in September 2024.
- Organise and facilitate subsequent quarterly meetings, some virtual and some in-person at key global events.

#### Stage 2: Action pillars support

- Set up and facilitate action pillar meetings of philanthropies and other funders around key themes/levers (e.g., research and evidence, policy and advocacy, etc.).
- Support action pillar chairs with meeting logistics, participant outreach, and identifying linkages between different groups' work to effectively tackle specific issues or opportunities.



- Support the development of strategies for each action pillar with clear, measurable objectives and plans.

#### Stage 3: Collaborating with regional partners

- Identify and manage relationships with regional partners for outreach to wider funding community, including scoping potential 'hub and spoke model'.
- Scope and implement mechanisms for integrating perspectives of climate vulnerable communities into the coalition's work. We expect prospective Suppliers to present their suggestions on how to deliver this in the proposal stage.

#### Stage 4: Annual convening

- Organise and deliver a climate and health convening, bringing together different types of funders and civil society actors to share their work and ground the coalition's work in the lived experience of those most affected by climate change.

#### Stage 5: Small grants advocacy programme

- Manage and deliver small grants, mainly to civil society organisations, to develop and deliver climate and health advocacy programmes. This initiative will build on a previous C&H small grants programme, with further background information available.
- Work with funders to navigate any administrative challenges to contributing financially to this programme.
- Manage the network of advocacy grantees and facilitate engagement with the funders' coalition (through the annual convening, bringing key advocacy organisations into dialogue with philanthropic organisations around key policy and advocacy windows).

#### Stage 6: Exploring future of the coalition

- Scope potential need for pooled funding for C&H and potential mechanisms available, including existing infrastructure or resources required to establish a new C&H pooled fund.
- Synthesise learning from pilot phase and produce recommendations for future of the coalition.

Where scoping activities lead to the implementation of further work, additional budget may be available.

Wellcome will lead on recruiting and contracting the Supplier, though both Wellcome and Rockefeller will assess applicants and select the successful Supplier. The Supplier will meet regularly with points of contact in both organisations once in-post and will share drafts with both for feedback.

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.

### **b. Deliverables**

Suggested key deliverables for this RFP include:



1. Fast-track work plan to facilitate a first closed-door meeting of philanthropic funders during New York Climate Week alongside a potential more public-facing launch event, including agreeing terms of engagement and initial objectives for the coalition.
2. Organise and facilitate subsequent quarterly meetings of the philanthropic strategy group (some virtual, some in-person around key global events).
3. Agree action pillars, identify key members, and organise and facilitate meetings at a frequency as agreed with co-chairs.
4. Deliver scopes of work for, and management of, initial action pillars to tackle specific issues and opportunities. Maintain ongoing communication between action pillars and the philanthropy strategy group to avoid working in siloes.
5. Conduct ongoing landscaping of active and emerging funding partners in the C&H space, with a focus on engaging philanthropic funders based in the Global South and aligning with existing regional philanthropic networks.
6. Plan and deliver the first annual multi-stakeholder convening.
7. Produce a landscape analysis of best practices on funder collaboratives, including a scoping exercise to assess the need and options analysis for a potential pooled fund for C&H, and best practice for integrating the lived experience of climate vulnerable communities into funder decision making.
8. Plan and implement management of the C&H small grants advocacy programme, in consultation with representation from civil society/climate vulnerable communities.
9. Conduct ongoing monitoring and evaluation of the coalition model and produce recommendations for its structure and management following the 18-month pilot.
10. Manage a public presence when required (website, email distribution list, social media if/as required).

### 3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	Wellcome and Rockefeller	Friday 5 July
2	Submission of Supplier expressions of interest and any questions to Wellcome Contact	Supplier	Friday 12 July
3	Return of Supplier Q&A to Suppliers	Wellcome and Rockefeller	Wednesday 17 July
4	Submission of full RFP Response	Supplier	Sunday 21 July
5	RFP Evaluation Period	Wellcome and Rockefeller	Monday 22- Friday 26 July
6	Submission of completed <a href="#">TPSRA2 form</a>	Supplier	w/c Monday 29 July
7	Supplier presentations for shortlisted Suppliers	Supplier	w/c Monday 29 July / 5 August
8	Notification of Contract Award	Wellcome	w/c 12 August
9	Contract Negotiation	Wellcome & Supplier	Friday 16 August
10	Contract Start Date	Wellcome & Supplier	Monday 19 August



#### 4. Response Format

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

##### a. Supplier Q&A

Suppliers who are interested in this activity are asked to confirm within your e-mail the following:

- Confirming whether you are an organisation or individual
- If an organisation, please provide registered name, address, and registration number.
- A non-binding cost estimate as a single figure in GBP
- Any questions you have about the exercise and activity

Prior to the submission of your RFP response, Suppliers are provided the opportunity to submit any questions they have about the exercise. All questions will be collated, anonymised, answered and returned to all suppliers who have submitted questions. All questions are to be submitted to the Wellcome Contact by e-mail in accordance with the RFP timetable.

##### b. RFP Proposal

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

##### RFP Questions

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

#	Question	Max.
1	Provide a short proposal outlining how you would approach the work.	750 words
2	Provide a delivery plan outlining the project deliverables and timelines.	250 words
3	Outline the proposed project team with a brief description of their relevant experience (please do not include CVs).	250 words
4	Outline your approach to equity, diversity, and inclusion, both in relation to your proposed methodology for the project and within your organisation.	500 words
5	Describe your approach to working closely with relevant points of contact at Wellcome and Rockefeller.	250 words
6	What makes you best placed to fulfil the requirements outlined in this RFP? This could include networks, previous experience, etc.	250 words
7	Provide two case studies of where you have successfully provided services similar to those described in this RFP.	500 words
8	Provide a detailed budget including breakdown justifying the proposed costs to meet Wellcome's requirements.	N/A
9	Outline the major risks and challenges you foresee with meeting the project requirements. Please include your mitigation strategies for these risk and challenges.	250 words



Proposals will be assessed against the following criteria:

<b>Approach (30%)</b>	<p><i>Quality:</i> Is the proposed approach strong, aligned and likely to deliver on our objectives?</p> <p><i>Equity:</i> Will the proposed approach ensure equitable and best practices are followed including diversity of engagement and inclusive outreach.</p>
<b>Team and experience (40%)</b>	<p><i>Skills and experience:</i> Does the Supplier have the relevant skills, experience, team diversity and networks to deliver this work?</p> <p><i>Subject expertise:</i> Does the Supplier have adequate experience in and knowledge of working with funders in the climate and/or health field to meet the requirements of this RFP</p>
<b>Delivery and outputs (20%)</b>	<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>
<b>Budget (10%)</b>	<p><i>Value for Money:</i> Does the proposal reflect value for money to deliver our desired outputs?</p>

### 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. Suppliers should 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 Wellcome's 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).

### Information Governance

Wellcome is committed to upholding data protection principles and protecting your information. The [Wellcome-Privacy-Statement-2023.pdf](#) 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 assessment before presentation stage to assess how you handle data.

## **Presentation**

Following submission of your proposal shortlisted supplier(s) will be invited to present via a virtual teams meeting. This meeting will last 60 minutes in total, with 25 minutes for presentation and the remaining for Q&A

## **5. 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.

## **6. 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.

## **7. 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.

## **8. Funding**

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

## **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. 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.

## **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. 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.

## **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. 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.

## **13. 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.

#### **14. Wellcome Contact Details**

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

Name: Emma Hamilton  
Role: Wellcome GRSP Team Co-ordinator  
Email: [e.hamilton@wellcome.org](mailto:e.hamilton@wellcome.org)