



Request for Proposal (RFP) for insights to inform the development of DR grantholder engagement approach

1. RFP Background & Objectives

1.1 Objective

The [Discovery Research team](#) (DR) at Wellcome requires a supplier to gather relevant insights from various stakeholders so that we can develop our grantholder engagement approach.

1.2 Background

In support of our mission, DR funds researchers (grantholders) to generate new knowledge that could transform health in ways we can't always anticipate today.

Our grantholders are key stakeholders for DR. Hence it is critical that we have a considered and strategic mechanism that facilitates engagement and relationship building between Wellcome staff and grantholders as well as among grantholders themselves. This will support us in achieving our goals in the following ways:

- **Transformative knowledge** – convening grantholders from across the breadth of the DR portfolio will help to **breakdown disciplinary siloes** and could lead to new collaborations and knowledge beyond what can be achieved in a single discipline
- **New generation of diverse research leaders** – convening of grantholders. generates shared learnings about the barriers and challenges in **research careers** leading to solutions through insight-driven action (by both grantholders and Wellcome).
- **Productive research environments** - convening of grantholders generates shared learnings about the barriers and challenges related to **research culture and environment** leading to solutions through insight-driven action (by both grantholders and Wellcome).

1.3 DR grantholders

The variety of grantholders within DR's portfolio is vast. There are approximately 1600* researchers funded by DR and there is a substantial diversity across this group in relation to the following aspects:

- **research disciplines and fields** – we fund researchers who are working in fields such as: genetics and genomics; cell biology, development and physiology; brain and behavioural sciences; molecular biology; immunology; pathogen biology and disease transmission; population and public health; social sciences and medical humanities; data sciences; and technology development.
- **how we fund researchers** – we fund researchers working in the fields listed above via 3 mechanisms: (1) Open Mode – these are recurring funding rounds where grantholder-led applications are submitted. Grants can be given to an individual researcher or a team of researchers; (2) Major Initiatives - investments in major research centres and/or infrastructures, for example The Wellcome Sanger Institute or The Francis Crick Institute and (3) Directed Activities - targeted catalytic investments in strategically relevant areas for DR.



- **career stages** – we fund researchers who are at the early, middle and senior stages of their research careers.
- **career type** – our grantholders range from academic researchers to clinician scientists. Moreover, there are also additional staff members supporting the work of the lead grantee(s) (eg: postdoctoral researchers, research assistants, research technicians/technologists, PhD Students, data managers, and other specialists).
- **locations** – our grantholders are located across the UK and internationally. There is a particular focus on lower- and middle-income countries within our international grantholders
- **Open Mode award personnel structures** – individual grants awarded via the Open Mode funding route can be given to a single lead researcher or a team of researchers.

* this figure doesn't include those that are supported by Wellcome and DR indirectly such as researchers working at our Major Initiatives (eg: The Francis Crick Institute or The Wellcome Sanger Institute) or those additional staff members supporting the work of the lead grantee(s). Hence our actual reach extend far beyond this.

1.4 How does DR currently support grantholder engagement and networking?

Our current mechanisms for engaging with our grantholders and supporting network building among them are:

- **Flagship convening event series** – known as “Researcher Meetings”, this is our primary large-scale annual engagement mechanism. It supports all of the goals listed above (section 1.2). Grantholders of all types from across our portfolio and staff members from DR and other teams in Wellcome attend these events. In our most recent round of Researcher Meetings we hosted a series of 4 meetings across May-June 2024, each attended by approximately 120 grantholders and 30 staff members. There was attendance from grantholders representing the range of aspects listed above (section 1.3 above). This takes the form of a series of 3-4 events (known as “Researcher Meetings”) each attended by approx. 120 grantholders.
- **Convening of specific grantholder groups** – in addition to our wide-reaching Researcher Meetings, we also offer more focussed convening of specific cohorts of DR grant holders. This may relate to award type or career stage. Depending on the group being convened, these activities support one or more of our goals. For example, biennial convening of the teams of researchers working on the eight [Discovery Research](#) platforms fosters breakdown of siloes and supports the establishment of better research environments. On the other hand, annual convening of early career researchers from across our portfolio mainly seeks to support developing the new generation of Research Leaders while also supporting our other goals but to a lesser extent.
- **Thematic research/field-building networks** – this relates to the more focused and deeper engagement that we have with relevant grant holders from across our portfolio and wider stakeholders in order to scope/deliver on areas of strategic interest. This type of activity helps us in spotting the next “big idea(s)” by bringing in



cutting-edge research and other sectoral expertise, ensuring that we are current (or ahead of the curve) in our understanding of advances in the relevant disciplines and fields of study. However, unlike our flagship and cohort-based convening activities, in this case convenings are usually more adhoc, time-bound and focused around addressing a particular problem or topic. Grantholders, as experts in their respective fields, are often included in these consultations and the interactions that happen during these activities contribute to relationship and network building.

Each of these elements within our current offer have overlapping and individual benefits but our offer to all grantholders needs to be evolved due to the following limitations:

- Opportunities for grantholder interactions are infrequent and our existing main mechanism for this (Researcher Meetings) is relatively resource intensive.
- We have limited ways to facilitate grantholder-led interactions and/or engagement beyond convening activities.
- Inclusion of more grantholders funded through Directed Activities mechanisms and those working within our Major Initiatives (see point 2 “how we fund researchers” in section 1.3 above for context).
- Better mechanisms for widespread engagement among LMIC grantholders is needed.
- Limited inclusion of individuals beyond the primary funded individual eg: all Co-Investigators on a team-based award plus others employed on an award.
- No inclusion of alumni grantholders.

Hence, we need to develop a grantholder engagement programme that is fit for purpose and contributes to progression our goals. To do that, consultation is needed with relevant stakeholders.

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 limit ambition or innovation.

To achieve the objective, we would like the supplier to:

- i. **Consult with other research funders and relevant organisations about their grantholder / fellow / member engagement offering** – here we would like to understand what their engagement offering/programme includes, how they manage/resource this, lessons learned about what they have found works/doesn’t work and what their future plans for their engagement approaches are. We are particularly keen to identify innovative ways that the various organisations foster relationship- and network-building with and among their grantholders or similar stakeholders. It is expected that the supplier will consult with a variety of different organisation types such as research funders, learned societies and other organisations that support researcher networks. Consultations with some



organisations have already been carried out and the insights from this will be shared with the supplier. The organisations consulted by the supplier should be based in the UK and internationally and should (either collectively and/or individually) have a grantholder / fellow / member pool that is representative of all aspects of DR's grantholder portfolio (see 1.3 above). It is expected that the supplier will consult with at least 20 organisations in total. DR will indicate some organisations that we would like the supplier to consult and will be able to provide contact details but the supplier will also be expected to suggest some relevant organisations and provide contact details for these if they are not known to Wellcome. In addition to direct consultation with individuals at the agreed organisations, suppliers will also be encouraged to use other methods to research the grantholder engagement offerings from other organisations such as online searches and literature searches.

- ii. **Consult with Wellcome staff members about our engagement offering(s) for grantholders** – DR exists as part of a wider org – Wellcome. Other teams across Wellcome have cohorts of grantholders through their funding mechanisms, for example Wellcome's three Solutions programmes: Mental Health, Infectious Disease and Climate and Health. Through consultation across Wellcome teams, we would like to gain a comprehensive understanding of Wellcome's current, previous and plans for future grantholder engagement mechanisms and the purpose of these. We would also like to gather lessons learned about what staff members have found works/doesn't work in relation to grantholder engagement. DR will indicate to the supplier which teams / individuals within Wellcome they should approach for consultation. It is expected that this will not be more than 6 teams and/or 15 individuals.
- iii. **Create a report with the findings from consultations with other organisations and Wellcome staff and propose recommendations for activities / workstreams to include our grantholder engagement approach** – once the consultations have been completed, it is essential that we have a clear view of the totality of the insights gathered and clear recommendations based on these insights. This will assist us in deciding which types of activities and workstreams to include in our draft grantholder engagement **programme**. The insights and recommendations should be clearly documented by the supplier in written format (MS word / ppt / PDF) and also presented verbally.
- iv. **Follow-on activity to consult grantholders:** It is essential that grantholders' views and requirements are incorporated into the shaping of our engagement offering for them. To gather this, we would like the supplier to consult different grantholders that reflects the diversity of our portfolio (as per section 1.3). It is anticipated that this will be via quantitative (e.g.: a survey) and qualitative (e.g.: 1:1 interviews and/or focus groups) insight gathering methods. The DR team will refer the supplier to relevant grantholders. Where possible qualitative insight gathering methods should make use of existing internal mechanisms that can facilitate this to avoid over burdening grantholders.



3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers AND RFP issued on Contract Opportunities webpage]	Wellcome	05 Nov 2024
2	Submission of Supplier Q&A	Supplier	11 Nov 2024
3	Return of Supplier Q&A to Suppliers	Wellcome	15 Nov 2024
4	Submission of RFP Response	Supplier	26 Nov 2024
5	RFP Evaluation Period	Wellcome	27 Nov – 4 Dec
6	Supplier Presentations	Supplier	w/c 09 Dec 2024
7	Notification of Contract Award	Wellcome	w/c 16 Dec 2024
8	Contract Negotiation	Wellcome & Supplier	Jan 2025
9	Contract Start Date	Wellcome & Supplier	End of Jan 2025

4. Response Format

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

4.1 Expression of Interest and Supplier Q&A

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.

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.

Please note, if we have an overwhelming response, we may choose to use this EOI stage as a selective phase, this is at Wellcome's discretion.

Suppliers are asked to submit a short expression of interest by e-mail to the Wellcome contact in accordance with the RFP timetable, which should contain the following information.

- Confirming whether you are an organisation or individual
- If an organisation please provide registered name, address, and registration number.
- Any questions you have about the exercise and activity

4.2 Submission of RFP Response



Suppliers submitting a full proposal should cover the following areas in their response:

#	Question	Max
1	Provide a proposal outlining how you would approach the work and the proposed methodology.	700 words
2	Provide a proposed delivery plan outlining the project deliverables and timelines. Tables or figures are encouraged.	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 equality, diversity and inclusion, both in relation to your proposed approach for the project and within your organisation.	250 words
5	Provide a detailed budget, including a breakdown justifying the proposed costs to meet Wellcome's requirements.	250 words
6	Describe what makes you best placed to fulfil the requirements outlined in this RFP. This could include networks, previous experience, etc. Please include a list of relevant stakeholders and networks with whom you work or have worked in the past.	300 words
7	Outline any significant risks and challenges you foresee with meeting Wellcome's requirements. Please include your mitigation strategies for these risks and challenges.	300 words
8	Provide at least one example of a project where you successfully provided services similar to those described in this RFP (links to the work, if available, are welcome).	250 words

Evaluation Criteria

Criteria	Detail	%
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>	30%
Experience	<p><i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?</p>	20%
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>	30%



Criteria	Detail	%
Budget	<i>Value for Money</i> : Is the proposed work within your budget and good value for money?	10%
EDI	<i>Do they have EDI policies and are these being put into practice in the proposal?</i>	10%
	Total:	100%

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.

We will not consider negotiations that are raised in your response to this proposal i.e. after the contract has been awarded so as not to delay the contracting process. Please ensure you engage with a relevant legal contact if applicable. 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 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.

4.3 Supplier Presentations



Following the submission proposals, selected shortlisted supplier(s) will be invited to present via a virtual teams meeting. This meeting will last 50 minutes in total, 20 minutes for presentation and the remaining time for Q&A.

5. About Wellcome

Wellcome is a global charitable foundation established in 1936. Wellcome improves health for everyone by funding research, leading policy and advocacy campaigns, and building global partnerships.

We fund curiosity-driven research ([Discovery Research](#)), and we're also taking on three of the biggest health challenges facing humanity – climate change, infectious disease and mental health. With a £36.8 billion investment portfolio, we give researchers the time and resources they need to make breakthroughs. Find out more about Wellcome and our work at: [wellcome.org](https://www.wellcome.org).

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. 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.

8. 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.

9. 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.

10. Funding

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

11. 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.

12. 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.



13. Wellcome Contact Details

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

Name:	Hardip Dhaliwal
Pronouns:	she/her
Role:	Procurement Manager
Email:	RFP@wellcome.org