



## **Request for Proposal (RFP) for a Learning and Support Partner to support the implementation of the Community Engagement Monitoring, Evaluation, and Learning Framework with Partners**

### **1. RFP Background**

#### **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 (CE) team focusses on the 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.

To deliver on this, Wellcome has spent over a decade in close collaboration with community engagement teams within our Major International Programmes (MIPs) located in Thailand, Kenya, Vietnam, India, Malawi, and South Africa. Our stable and sustained funding not only addresses local needs but also fosters trust and long-term relationships by involving affected communities in research and sharing findings with them. As the landscape of community engagement has evolved, Wellcome has adapted its approach, particularly in the Global South. Our MIPs have been crucial partners, helping us develop innovative methods and emphasise the global importance of community-focused health research.

Across the years and change, a persistent challenge has remained: how to effectively demonstrate the impact of community engagement on both relationships and research outcomes. Recognising this complexity, we sought to develop a Monitoring, Evaluation, and Learning (MEL) Framework with our partners to highlight Community Engagement's significance to researchers and the global health sector.

In 2024, Wellcome commissioned [Itad](#) to work with Wellcome and a set of 7 strategic partners, noted in 1.3, to co-create an evaluation framework to effectively monitor and evaluate the impact of community engagement programmes.



The aim of the framework is to:

1. Strengthen practice and advance long-term strategies for Community Engagement in Global Health
2. Better evidence the contribution of Community Engagement to social, research and health impact and make the case to researchers and the wider global health sector for this impact
3. Improve the impact of research through Community Engagement

The programme of work culminated in the publication of the [Monitoring, Evaluation and Learning for Community Engagement in Health Research](#) learning platform - an online, open-source resource.

## 1.2 Next Phase

This RFP seeks to engage a learning and support partner to pilot and optimise the MEL framework that has already been developed. Whilst there was some testing during the MEL framework development this phase will support longer term piloting across a wider set of partners. Therefore, we require a Learning & Support Partner with strong strategic and delivery capacities to work with Wellcome and other partners to support their utilisation of the framework; gather learning from the implementation and use of the framework for its iterative development, and to disseminate the framework to a broader set of stakeholders in the global health research ecosystem.

As this is a pilot phase for an existing tool it is a requirement of this contract that the successful Supplier will sub-contract the consultancy that developed the original MEL framework, [Itad](#). The Itad role is as a technical advisor, with responsibility for specific deliverables. The scope of work for this has been agreed directly with Itad and will include delivery of Objectives 1 and 4, delivery of some outputs for Objective 3 and technical advice to the selected supplier throughout.

We anticipate a contract period of 18-months, and with a budget range of £150,000 to £250,000. This sum will include any applicable taxes, expenses and the sub-contracted amount for Itad which we believe corresponds to 30-35% of the work, with the final cost being agreed between Itad and the chosen Supplier.

## 1.3 Partnerships & Relationships

The development of the MEL framework was produced through co-creation methods, that were equitable and respectful and met the needs of our partners who are based in very different contexts and have diverse programmes and priorities.

Phase 2 (this phase) will need to develop appropriate ways of working that continue this approach and help strengthen our relationship and collaboration with our Partners. Some of these partnerships and relationships will include, but are not limited to:



- Africa Health Research Institute ([AHRI](#))
- African Population and Health Research Center ([APHRC](#))
- KEMRI-Wellcome Trust Research Programme ([KWTRP](#))
- Malawi-Liverpool Wellcome Programme ([MLW](#))
- Mahidol Oxford Tropical Health Network ([MORU](#))
- Oxford University Clinical Research Unit ([OUCRU](#))
- Science for Africa Foundation ([SFA Foundation](#))

We refer to these organisations as the “pilot partners”.

Additionally, you will work closely with:

- Wellcome (CE team and key Wellcome colleagues)
- Itad

## 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. Wellcome will be guided by the supplier as to what is a reasonable budget for this activity and approach.

### 2.1 Objectives of the work

**Objective 1 [Led by Itad]:** Ensure relevant staff members in Wellcome understand the MEL framework and consider its application within work they commission and the work of our partners.

**Objective 2:** Optimise the framework to ensure its maximum practical relevance and applicability for the “pilot partners”, ensuring they have sufficient support to embed the framework, including implementation of an extended pilot and developing use cases to bring the framework to life.

\*note that we see Objective 2 as the largest piece and the focal point for Phase 2

**Objective 3 [Shared with Itad]:** Equip Wellcome and its partners to disseminate the framework throughout the Global Health system.

**Objective 4:** Improve clarity on how the MEL Framework intersects with other frameworks, existing and in development, identifying commonality and where tools could be mutually reinforcing and strengthening

**Objective 5 [Led by Itad]:** Evaluation of the Framework’s use and impact and ongoing development of the MEL framework to align to pilot programmes’ aims and use cases and ensure complementarity with other learning and evidence.

### 2.2 Approaches & Ways of Working



Objective	Approaches
<b>Objective 1 [Itad]</b>	Itad will create training and supporting materials for Wellcome’s Community Engagement team, and others within Wellcome identified by the Wellcome project team, to ensure they understand the MEL framework and consider its application within work they commission and the work of our partners.
<b>Objective 2 [Supplier]</b>	<p>Build capacity of the co-creation partners in the use of the framework so that it can be implemented effectively. We are open to models for this, but one example may be to run an extended pilot with interested partners and we are open to suggestions that include in person convenings and learning events.</p> <p>We expect there to be a strong peer-to-peer learning element for problem solving between partners; space for presentation of user journeys; and plans for sustainability beyond the 18 months of this project.</p> <p>The type of support should be light touch and flexible as some partners may need different levels of support and be at different stages of the MEL framework development as a team and organisation. This should also provide us with insight for any changes to the framework itself.</p> <p>You will work with the 5 relationship managers (internal to Wellcome) responsible for the CE components of the programmes listed in 1.3 to define their role in the support during this project period and moving forward.</p> <p>Develop case examples from the extended pilot to illustrate and further contextualise the framework.</p> <p>Gather learning on utility of the Framework and develop the Framework in response to use cases to ensure it is optimal, working with Itad to implement changes [this is linked to Objective 5].</p>
<b>Objective 3 [Shared Itad and Supplier]</b>	<p>Provide strategic advice and create a two-year dissemination and communications plan, this should include identifying relevant conferences and other platforms/networks. This plan should be co-created with Itad, Wellcome and the pilot partners. It should act as a process document which evolves over the course of the project, enables sharing of challenges and celebration of success. Partners (pilot partners, Wellcome, Itad and others) will lead on different elements of implementation of this plan and should be supported to do this</p> <p>Itad will develop an Ambassador Pack that enables the MEL framework to be easily shared either in person or online.</p>
<b>Objective 4 [Supplier]</b>	<p>Identify and actively engage with internal and external stakeholders working on MEL tools and practice to enable knowledge exchange and identify commonality and where tools could be mutually reinforcing in development of the broader evidence base for Community Engagement.</p> <p>There are two sub objectives within this, one to identify commonality with existing MEL frameworks and evidence building initiatives to mutually strengthen and collaborate. The second, to enable knowledge exchange</p>



	<p>with MEL Frameworks and evidence initiatives which are in development to exchange learning and assess whether and how the CE MEL Framework could be leveraged for their work and provide light touch support to enable this.</p> <p>Examples of internal and external work streams &amp; stakeholders with existing initiatives might include (but are not limited to):</p> <ol style="list-style-type: none"> <li>1. <a href="#">Realist Review of Community Engagement (REAL)</a> – Strengthening the evidence base for CE and participatory practice in health research.</li> <li>2. <a href="#">REAL2</a> realist review of participatory action research in health</li> <li>3. <a href="#">National Institute for Health and Care Research (NIHR)</a> – Currently developing evaluation and evidence work on CE</li> <li>4. <a href="#">AIDS Vaccine Advocacy Coalition (AVAC)</a> – Producers of the Good Participatory Practice Guidance Contingency</li> <li>5. <a href="#">UNICEF Evaluation</a> – Publishers of the Minimum Quality Standards and Indicators for Community Engagement and a range of evaluation tools</li> <li>6. <a href="#">Praxis</a> – A range of practice around participatory monitoring and evaluation, community-led evaluations, and leaders in MEL training and facilitation.</li> <li>7. <a href="#">DELTAS Africa</a> – A monitoring and evaluation framework has been developed for DELTAS Africa by Science for Africa Foundation which includes a Community Engagement pillar and has been informed by the CE MEL Framework co-creation process</li> </ol> <p>Examples of internal and external work streams &amp; stakeholders with initiatives in development might include:</p> <ol style="list-style-type: none"> <li>8. <a href="#">Centres for Exchange: Learning &amp; Evidencing Partner</a> are assessing to what extent aspects of the MEL framework can be applied to the learning plans for these 8-10 funded organisations (all receiving small grants of circa £200,000 over two years) as well as broader programmatic evaluation.</li> <li>9. <a href="#">Wellcome’s Equity department</a> will be creating the MEL framework and theory of change for the newly formed Equity department at Wellcome. This is likely to be high level but useful to engage with.</li> </ol>
<p><b>Objective 5 [Itad]</b></p>	<p>Itad will update the Framework at set milestones in response to feedback and learning from the pilot, including integrating the case examples to further illustrate elements of the Framework, to ensure it is useable, adaptable, and contextually relevant.</p> <p>Itad will evaluate the framework’s use and impact at regular intervals, including tracking usage and downloads.</p>



## 2.4 Deliverables

Phase	Deliverable	Related Objective
Phase 1	A delivery plan for all objectives informed by an assessment of partner capabilities and capacities [Supplier]	All
	Establish relationships and co-create a ways of working document schedule for when and how the framework will be iterated [Itad and Supplier]	All
	Training plan for the internal training and stakeholder list developed [Itad]	Objective 1
	1-3 consultation sessions with partners on plan for extended pilot and delivery of a refined plan for delivery of Objective 2 [Supplier]	Objective 2
	Development of Ambassador Pack to enable Wellcome and all the partners involved to share the framework at conferences and meetings they attend, or via email to their networks – this could include slide deck, briefing notes and text for Linked In and email - for external and internal use [Itad]	Objective 3
	Mapping of relevant conferences and other platforms for dissemination [Supplier]	Objective 3
	Agree a final list of 4-8 CE evidence and MEL projects to focus on in Objective 4. Map the priorities and understand the timelines of the organisations involved and develop a plan for effective engagement, knowledge exchange, and alignment.	Objective 4
Undertake an access audit and embed any suggested changes [Itad]	Objective 5	
Phase 2	1-2 bespoke training sessions, each repeated up to three times. To be delivered for up to 30 Wellcome staff. Development of any training materials needed for the training sessions. Development of a post-training slide deck to support the implementation of training. [Itad]	Objective 1
	Lead the delivery of the extended pilot with external partners, as agreed in Phase 1 [Supplier]	Objective 2
	Develop a 2-year dissemination and communications plan and provide strategic advice to Wellcome and its partners on dissemination of the Framework [Supplier]	Objective 3
	Facilitate tailored alignment and practice exchange sessions with stakeholders who have developed or are developing	Objective 4



	related MEL frameworks and/or evidence work in the CE space, as identified in phase 1 [Supplier]	
Phase 3	<p>Deliver a report detailing:</p> <ul style="list-style-type: none"> <li>- Evaluation of the internal Wellcome training and recommended next steps [Itad]</li> <li>- Recommendations for any additional tools needed to utilise the framework [Supplier]</li> <li>- A summary of the extended pilot and success to date</li> <li>- Sustainability plan building on the extended pilot [Supplier]</li> <li>- How the CE MEL Framework intersects with other key Frameworks and evidence, existing and in development, where alignment has been fostered and recommendations for next steps [Supplier]</li> <li>- An updated dissemination and communication plan covering a 1-year period from conclusion of Phase 3.</li> </ul> <p>Write up of 10-15 case examples (each with a 300-word summary version and 1 page version) from the pilot period that can be used to illustrate the framework. These should be a mixture of full examples of how a programme might benefit from using the framework, examples of its use and impact in different organisational contexts, and specific examples of monitoring, evaluation or learning in action that can be tailored to illustrate specific areas of the framework [Supplier]</p> <p>All updates and changes made to the Framework including all feedback and learning from Phase 2 and embedding approximately 10 case examples into the Framework</p> <p>Ambassador pack updated to include relevant case examples [Itad]</p> <p>A log of all feedback and changes implemented to the framework and an analysis of usage and engagement with the framework over the 18-month period [Itad]</p>	<p>Objective 1</p> <p>Objective 2</p> <p>Objective 2</p> <p>Objective 2</p> <p>Objective 4</p> <p>Objective 3</p> <p>Objective 2</p> <p>Objective 5</p> <p>Objective 5</p> <p>Objective 5</p>
Unscheduled	<p>Continual documentation of feedback from the pilot period and suggested changes [Supplier]</p> <p>Monthly meeting with Supplier, Itad and Wellcome to agree implementation of changes [All]</p>	Objective 2



	Ongoing technical advice on MEL and the usage of the MEL Framework [Itad]	
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## 2.4 Timeline & Budget

To achieve these aims, we are seeking an experienced supplier who works in multiple geographies, with a demonstrated track record of equitable, accessible, and inclusive practices. We expect this supplier to apply a strong values-based approach to trusted relational working and bring authentic co-design and collaborative methodologies to all aspects of work.

The supplier will have the required expertise and track record to undertake this work, and as such this RFP is open to candidates who meet that criterion. We expect the work to commence in April 2025 and to run over an 18-month period.

The budget available for this work is £150,000 to £250,000. This sum will include any applicable taxes, expenses and the sub-contracted amount for Itad which we believe corresponds to 30-35% of the work, with the final cost being agreed between Itad and the chosen Supplier.

## 3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issued on <a href="#">Contract Opportunities</a> webpage	Wellcome Trust	10 <sup>th</sup> January 2025
2	Submission of Expression of Interest and Supplier Q&A	Supplier	22 <sup>nd</sup> January 2025
3	Publication of Supplier Q&A on <a href="#">Contract Opportunities</a> webpage	Wellcome Trust	7 <sup>th</sup> February 2025
4	Submission of RFP Response	Supplier	21 <sup>st</sup> February 2025
5	RFP Evaluation Period	Wellcome Trust	21 <sup>st</sup> February to 14 <sup>th</sup> March 2025
6	Supplier Presentations	Supplier	19 <sup>th</sup> and 21 <sup>st</sup> March 2025
7	Notification of Contract Award	Wellcome Trust	26 <sup>th</sup> March 2025
8	Contract Negotiation	Wellcome Trust & Supplier	March and April 2025
9	Contract Start Date	Wellcome Trust & Supplier	End April 2025

## 4. Response Format

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





## Expression of Interest and Supplier Q&A

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.
- 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 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.

## RFP Response

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

#	Question	Word Limit
1	Outline your approach for delivering the activities and objectives of this RFP. Please include: <ul style="list-style-type: none"><li>• Methods you will be using and learning approaches you will be using.</li><li>• Stages and timeframes in which you propose to meet the requirements.</li><li>• Provide a potential timeline which includes points for review.</li></ul>	1500
2	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
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	Please describe how you see working with Itad and Wellcome, including contract development and project management,	100
5	Describe the project their team, role and responsibilities, how the team will be managed and how each role will be equitably compensated.	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	Provide a cost proposal which details and justifies the proposed costs to meet our requirements. Please include estimated sub-contracted ballpark within your budget breakdown and any applicable taxes and expenses.	350

### 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> <p><i>EDI consideration:</i> Is the methodology inclusive and responsive to needs and interests of a diversity of partners and contexts?</p>	40%
Team & 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 pertains to how the organisation practices not just perspectives/experience)</p>	25%
Delivery & Outputs	<p><i>Communication:</i> Is there a good plan for communicating with the Wellcome and Itad 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>	25%



Budget	<i>Value for Money: Is the proposed work within your budget and good value for money</i>	10%
Accessibility	<i>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. *</i>	
	<b>Total:</b>	<b>100%</b>

### 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 should review Wellcome's Standard terms and Conditions [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.

### **Supplier Presentations**

Following a submission of the proposal successful proposals will be invited to a virtual meeting which will last 60 minutes in total and will be a PowerPoint presentation followed by questions and answers session.

### **5. 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](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 point 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](mailto:R.Mahdi@wellcome.org)