

# Request for Proposal (RFP)

## Monitoring, Evaluation and Learning support

### Issued: 14<sup>th</sup> August 2020

#### 1. Introduction

The Wellcome Trust (the ‘Trust’, ‘Wellcome’) is the world’s second highest spending global charitable foundation. It is both politically and financially independent. Wellcome supports scientists and researchers, takes on big problems, fuels imaginations, and sparks debate. Our funding supports over 14,000 people in more than 70 countries in exploring ideas, seeking solutions and improving the human condition through science, population health, medical innovation, the humanities and social sciences and public engagement. Further information on the Wellcome Trust can be found at [www.wellcome.ac.uk](http://www.wellcome.ac.uk) and all prospective suppliers are encouraged to visit the website to gain an insight into the organisation; particularly the sections on our active funding schemes (<https://wellcome.ac.uk/funding/scheme-finder>) and our programmes in Africa and Asia (<https://wellcome.ac.uk/what-we-do/our-work/programmes-and-initiatives-africa-and-asia>).

We are developing a single strategy for Wellcome, with science at its heart. Science is central to Wellcome, our reputation, our history and our future, giving us the authority to take on certain challenges. Highlights:

- We will have a strong foundation of discovery research (also known as basic research), so we can support great ideas that may have unanticipated benefits for our mission. This will include a broad range of disciplines and clinical research.
- We will also seek to solve three urgent health challenges – infectious diseases, mental health problems, and the impact of climate change on health, through programmes that draw on Wellcome’s expertise across science, innovation and society to deliver ambitious goals.
- Research culture, and Wellcome’s internal culture, will be central to our strategy. The best science will come from a diverse workforce, an inclusive and creative research environment, and effective leadership.

The Wellcome Trust Board of Governors has approved the overall shape of this strategy. Much detail of what this will mean in practice has still to be decided and will be worked through over the coming months.

## 2. RFP Scope & Deliverables

We are seeking a company or a group of consultants that can support our Monitoring, Evaluation and Learning (MEL) work for the new strategy. The MEL team at Wellcome is seeking external support in the delivery of the following outputs for the new strategy:

- Theories of change for the main components of the new strategy - three health challenges and discovery research; with one ToC for each, including relevant nested theories of change; presented in narrative and visual formats appropriate for both internal and external audiences.
- A MEL approach and plan for each of the main components of the new strategy
- An improved organisation-wide MEL framework: currently known as The Wellcome Success Framework<sup>1</sup>.

Dedicated Wellcome MEL leads have been appointed and are responsible for the delivery of the outputs above for each of the main components of the new strategy. We would like the consultants to review the drafts put together by the Wellcome MEL leads, providing advice and feedback on how to improve these informed by effective MEL practice and content area expertise. Bringing new ideas and creative thinking and building on the existing learning to date from Wellcome's MEL journey, the consultant will:

- Review ToCs in line with the Wellcome ToC guideline to check for: logical flow, adequate specification of outcomes and their rationales, assumptions, evidential basis and clarity of the narrative.
- Assist with the development of suitable approaches to monitor, evaluate and learn from programme implementation, including where appropriate, to support and enable adaptive management.
- Assist the MEL team to identify relevant and appropriate methods and indicators for continuous programme monitoring and approaches and periodic evaluations with a focus on information and knowledge users.

The consultant may be required to provide support face to face, subject to staff returning to the office and depending on the location of the consultant, or remotely, via video/audio conferences and email.

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<sup>1</sup> <https://wellcome.ac.uk/reports/wellcome-success-framework-report-data-2012-17>

### **3. Requirements and desirable skills**

We seek an individual or team of MEL consultants to ensure support offered to Wellcome is coherent and systematic across all the strategy components. The consultant(s) must be able to demonstrate the following requirements:

- Significant experience of leading the development of ToCs for large, complex programmes (linking strategic planning and MEL) – with a focus the use of ToC and evidence for strategic decision-making
- Extensive experience leading the development of MEL plans for large, complex programmes (MEL for programme implementation) – including for adaptive management and systems change
- Substantive MEL content expertise in any of the three health challenges and/or discovery science (MEL content expertise)
- Experience of change management in organisations similar to Wellcome.

### **4. Response Format / How to apply**

Interested parties are required to send Jessica Romo: [j.romo@wellcome.ac.uk](mailto:j.romo@wellcome.ac.uk) by 28<sup>th</sup> August 2020 a written proposal that includes:

- A brief overview of your organisation and/or team, including track record and expertise in relevant areas of work.
- Your proposed approach and ways of working
- Responsibilities, level of effort and daily rate for each consultant
- One-page CV for each consultant, matching expertise and experience to the work components and requirements
- Examples of previous work relevant to this assignment
- Two referees for each consultant with their name, organisation, work assignment(s), contact details.

Suppliers are asked to reference “Section 2: Scope and Objectives” and “Section 3: Deliverables” in providing their written proposal.

Supplier’s proposals will be assessed using the following criteria and a rating scale:

- a) MEL expertise and experience
- b) Thematic area knowledge and experience
- c) The proposed approach and ways of working
- d) Understanding of the Wellcome context and the purpose and scope of the work.
- e) Value for money and justification for the proposed costs

## 5. Timetable and Budget

Below are estimates (in working days) needed for each strategy component across a period of 6 months (from October 2020 to May 2021):

Strategy component	Min. working days	Max. working days
<b>Infectious diseases</b>	24 (6 per component)	48 (12 per component)
<b>Mental Health</b>		
<b>Climate Change</b>		
<b>Discovery science</b>		
<b>Organisation-wide MEL framework</b>	4	8
<b>Total days</b>	<b>28</b>	<b>56</b>

A flexible working style will allow Wellcome to meet its needs at a pace it finds comfortable.

#	Activity	Responsibility	Deadline
1	RFP issued to potential suppliers	Wellcome	14 <sup>th</sup> August 2020
2	Applications from interested parties	Suppliers	11 <sup>th</sup> September 2020
3	Shortlisted candidates invited for interview	Wellcome	25 <sup>th</sup> September
4	Interviews	Wellcome	9 <sup>th</sup> October
4	Notification of Contract Award	Wellcome	16 <sup>th</sup> October 2020
5	Contract Negotiation (and scheduling)	Both	30 <sup>th</sup> October 2020
6	Contract start date: Inception meeting	Both	2 <sup>nd</sup> November 2020
7	Theories of change for health challenges and discovery research	Both	End of February 2021
8	MEL plans for health challenges and discovery research	Both	End of March 2021
9	Wellcome Success Framework	Both	End of June 2021

Important to note: Rows 6 to 9 in the above table (highlighted in green) are subject to change in line with the new organisational design, recruitment of leads for health challenge and discovery research and any sequencing requirements.

## **6. Non-Disclosure and Confidentiality**

Prospective suppliers should be aware that inappropriate publicity could have a serious effect on 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.

## **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. 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.

## **9. Wellcome Contact Details**

The single point of contact for all communications relating to this RFP is:

Jessica Romo  
Evaluation and Learning Lead  
Wellcome Trust  
Email: [j.romo@wellcome.ac.uk](mailto:j.romo@wellcome.ac.uk)