



Request for Proposal (RFP) for Change Management Proposal for Finance Transformation Programme

1. RFP Background & Objectives

Wellcome supports science to solve the urgent health challenges facing everyone.

- Wellcome is a politically and financially independent global charitable foundation supporting research to improve health.
- We want everyone to benefit from science's potential to improve health and save lives - our vision is a healthier future for everyone.
- We support discovery research into life, health and wellbeing, and we're taking on three worldwide health challenges: mental health, infectious disease, and climate and health.
- All our work is funded from our £37 billion investment portfolio.

Wellcome has c1,000 employees all based in the Gibbs Building on Euston Road, with c350 engaged in research activity and c650 in operational areas including portfolio management and research funding. The Finance function is c60 strong.

Wellcome is currently undergoing a finance transformation programme which seeks to improve the operational efficiency of the Finance function and enhance the level of organisation wide engagement with and utilisation of financial data/insights to make more informed decisions. The programme has reached a crucial phase and a strategic change management plan is essential to maximise engagement, identify emerging challenges, and ensure smooth transition to future ways of working. The programme involves:

Process/ service redesign: We are reviewing of our existing services within the finance team and other teams across Wellcome, identifying the opportunities for improvement and creating service blueprints that will map end-to-end service experiences.

Systems upgrade: The current Finance Platform encompasses multiple systems, some of which have existed for over 20 years. Our main systems are Unit4 ERP (also known as Agresso, for core financials), Concur (Expenses and Invoicing) and IBM Cognos TM1 (Financial Planning and Analysis). The current platform reflects an environment that has grown organically over time as the organisation has changed, but no longer supports best practice. The finance transformation programme will upgrade system functionality by replacing the Unit 4 ERP7, SAP Concur and IBM Cognos TM1 systems with Oracle Fusion.

The planned go-live is 1st May 2025.



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.

The objective is to conduct a review of our finance transformation programme and to develop a robust change management proposal aimed at enhancing the programme's effectiveness and ensuring successful implementation.

Wellcome does not currently have it's own internal Change Management function or team.

Scope of Work:

Whilst this is a significant change across processes and systems, not all parts of Wellcome are equally impacted. The finance team of 60 people will be impacted the most, along with c100 people who interact with the core finance processes (invoice processing, financial planning, monitoring and forecasting). There will be more wider impact from changes to staff expenses process following the move to a new system (the volume of claims is c4,000 a year).

Programme Review:

- Change Impact Assessment
 - Identify and assess the impact of the transformation programme on teams across Wellcome, particularly on finance teams and teams who engage with financial data/process in fulfilment of their responsibilities.
- Resistance Management
 - Identify potential areas of resistance and propose strategies to address and mitigate resistance to change.
- Performance Metrics
 - Define key performance indicators (KPIs) to measure the effectiveness of the change management plan and ensure continuous improvement.
- Roles and responsibilities
 - Identify critical roles across Wellcome that will need to either lead or engage on change management activity and their respective responsibilities.
 - Ensure appropriate knowledge transfer takes place and is embedded in the Wellcome programme team.

Deliverables:

- Change Management Proposal
 - A comprehensive proposal detailing the change management strategy, including actionable recommendations, timelines, and resource requirements.
- Executive Summary Presentation



- A concise presentation summarising key findings and recommendations for senior leadership.

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.

3. RFP Timetable

#	Activity	Responsibility	Date
1	Submission of Expression of Interest and Supplier Q&A	Supplier	10 Jul 2024
2	Return of Supplier Q&A to Suppliers and invitation to submit full proposal	Wellcome	15 Jul 2024
3	Submission of RFP Response	Supplier	22 Jul 2024
4	RFP Evaluation Period	Wellcome	22 Jul 2024 to 25 Jul 2024
5	Supplier Presentations for shortlisted suppliers	Supplier	24 Jul 2024 & 25 Jul 2024
6	Notification of Contract Award	Wellcome	29 Jul 2024
7	Contract Negotiation	Wellcome & Supplier	Aug 2024
8	Contract Start Date	Wellcome & Supplier	02 Sep 2024 <i>or as soon as contractual negotiations are concluded</i>

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.

We will review expressions of interest to ensure that proposals fit within the scope of the RFP. Where we are satisfied of this, we will invite organisations to submit a full proposal to the RFP in accordance with the RFP timetable. Please note that you should only submit a full proposal to the RFP if you have been invited to do so.

Submitting an EOI is not a binding commitment to submit a full proposal should your organisational priorities change, you will not then be penalised for future opportunities.

RFP Response

Suppliers submitting a full proposal should cover the following areas in their Response which should be **a maximum of ten pages**, excluding any references or images:

#	Question
1	Provide an overview of both the ownership and management structure of your organisation, including organisational charts, including any differentiators (as they relate to Wellcome, its sector and the services that we are seeking).
2	Play back to us your understanding of our requirements and describe how you propose to meet them.
3	Provide a brief case study of where you have successfully provided services similar to those described in this request for proposal.
4	Provide a brief overview of the two most recent clients won.
5	Please detail your proposed resourcing for the work and their relative seniority.
6	Highlight to us any risks which you foresee with meeting Wellcome's requirements.
7	Make us aware if you envisage using any third parties for the delivery of any aspect of Wellcome's requirements?
8	Are any individuals included within your proposal provided to yourself through a Personal Services Company? If so, please detail.
9	Provide details of any existing restrictions that may impact your ability to meet Wellcome's requirements. These should include (but not be limited to): a) Conflicts of interest with other clients b) Conflicts of interest with internal Wellcome staff c) Restrictions on your licence to operate in certain jurisdictions
10	Provide a cost proposal which details and justifies the proposed costs to meet our requirements.

Evaluation Criteria

Criteria	Detail	%
----------	--------	---



Methodology	<i>Coverage:</i> How well are the desired focus areas (as outlined in the specification) covered in the proposed methodology addressed? <i>Quality:</i> Is the proposed methodology aligned with our needs? <i>Utility:</i> Will the proposed methodology deliver the desired, credible, and useful results?	20%
Experience	<i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?	20%
Delivery & Outputs	<i>Communication:</i> Is there a good plan for communicating with the Wellcome team? <i>Delivery plan:</i> Is the proposed delivery plan appropriate and achievable? <i>Feasibility:</i> How feasible is the delivery plan? Are there significant risks associated with the proposed timelines, and how well are they mitigated?	40%
Budget	<i>Value for Money:</i> Is the proposed work good value for money?	15%
EDI	<i>Do they have EDI policies and are these being put into practice in the proposal?</i>	5%
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>	N/A
	Total:	100%

Contract Terms and Conditions

As part of the RFP process, Suppliers are also required to submit their standard terms and conditions along with their proposal. This is to allow our Legal team to do a high-level initial review ahead of contract award and contract negotiation.

Supplier Presentations

Following a submission of the proposal successful proposals will be invited to a virtual meeting which will last one hour and 15 minutes in total and will be a PowerPoint presentation followed by a questions and answers session. We may also require a brief follow-up call after these presentations.



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. 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 \(www.gov.uk\)](https://www.gov.uk/government/guidance/disability-confident-employer-scheme). 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.

9. 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.

10. 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.

11. Funding

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

12. 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.

13. 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.

14. Wellcome Contact Details



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

Name: David Sriyoheswaran
Pronouns: He/His
Role: Finance Lead, Finance Transformation Programme
Email: D.sriyoheswaran@wellcome.org