



## Request for Proposal (RFP) for

### Developing Wellcome Global Monitor as a vehicle for building brand equity

#### 1. RFP Background & Objectives

Hello. We're the Wellcome Trust. We are a politically and financially independent charitable foundation that supports science to solve the urgent health challenges facing everyone.

We fund health and science research, about £1bn each year to give you a sense of the scale. Some of our recent work includes funding the development of a Covid vaccine, playing a key role in limiting the spread of Ebola and developing new treatments for mental health. We're not a traditional charity like Oxfam or Cancer Research because we don't fundraise for donations; all our work is funded from our £38bn investment portfolio, which has tripled in value over the last decade, enabling us to spend £16 billion on our mission over the next ten years.

Our [new strategy](#) aims to make a radical contribution to improving mental health, protecting from infectious disease and mitigating the health effects of climate change. These are the urgent **health challenges** of the 21st century and science is essential to solving them.

We also support a broad programme of [discovery research](#) across any field with the potential to change the way we understand life, health and wellbeing – both to help us tackle these great challenges, and to inspire further improvements in human health.

Our perspective on health and how to improve it spans science, innovation and society. We connect people across research and society to discover new knowledge, inspire new ideas, and create new solutions. We campaign for better science and better systems to ensure solutions work for those who most need them and have the right support to be implemented, whether that's today or over the next 30 years.

In all that Wellcome does, we want the broadest possible range of people to contribute to, and benefit from, science's potential to change the world. [Diversity and inclusion](#) are central to our strategy and are embedded into all the work we fund and do.



## Wellcome Global Monitor

Wellcome Global Monitor (WGM) is the world's largest study into how people around the world think and feel about science and major health challenges. Its mission is to leverage unique data about attitudes to science and health topics from 140+ countries<sup>1</sup> as a 'calling card' to stimulate global engagement with Wellcome's mission.

We've run the survey twice, as part of the Gallup World Poll, with the findings publishing in 2019 and 2021.

### First wave – data collected April to December 2018, results published June 2019

[The survey](#) covered topics such as whether people trust science, scientists, and information about health, the levels of understanding and interest in science and health, the benefits of science, the compatibility of religion and science, and attitudes to vaccines.

#### Objectives:

- Set the agenda for well-evidenced public engagement
- Optimise usage of the dataset by researchers
- Enhance awareness of Wellcome's brand and programmes

### Second wave – data collected August 2020 to February 2021, results published October and November 2021.

In contrast to the first wave, the second split results across two reports. It was hoped that releasing individual reports on distinct themes and promoted with targeted campaigns would spread the impact of the survey over a longer period.

1. [The role of science in mental health](#) aimed to find out how important mental health is to people across the globe and their views on science's role in addressing mental health problems. It also explored the actions people with anxiety or depression take to feel better.
2. [How Covid-19 affected people's lives and their views about science](#) asked about the impact of the pandemic on people's lives, whether they supported their government's participation in global efforts to prevent future diseases, the level of trust people have in science and scientists during the pandemic compared to two years prior, and the extent to which people think science informs the decisions of those who offer guidance on Covid-19 – particularly their national government.

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<sup>1</sup> As a result of the COVID-19 pandemic, all 2020 Wellcome Global Monitor interviews were conducted entirely via telephone in only 113 countries rather than in over 140, as in 2018 (in 34 countries by phone and in 110 face to face).



Objectives:

*The role of science in mental health*

- Promote the role of Wellcome as a convenor and catalyst for driving transformational change in mental health research
- Highlight the importance of mental health, the range of approaches people reach for in improving theirs, and the need for more scientific research into all of these solutions

*How Covid-19 affected people's lives...*

- Launch Wellcome as a thought leader in pandemic preparedness
- Continue to build Wellcome's profile in Germany, using WGM data to spike interest in our role in pandemic preparedness
- Drive action on pandemic preparedness in key countries by highlighting trends in trust in science and global cooperation

## Target audiences

Despite our use of the term 'public initiative' our target audience is not the general public, our focus is people and organisations who might have good reason to engage with Wellcome, but don't. Specifically:

**Policy influencers and activists** who actively work in areas relating to one of the health challenges and/or discovery research (in science and beyond) or in an organisation with a complementary mission, such as a B Corps, Government/Multilateral Departments or a public sector body.

We need to do more to engage a global audience of policy influencers, activists, researchers, and practitioners working in areas relating to the health challenges and/or discovery research. Our goal is to build recognition and trust with these audiences, improve their understanding of the role of science in tackling the health challenges, and make them aware of our mission and how we can support them to deliver change. We want to inspire action and become the 'partner of choice' for key organisations who can help us deliver our strategy.

**Researchers and practitioners** who actively work on one of the health challenges and/or discovery research, particularly those outside the life-science field e.g. data scientists, climate scientists, social scientists.

We're looking to increase the diversity of researchers who engage with Wellcome both in terms of protected characteristics and disciplines.

## Geographic focus

Wellcome has a reasonably strong reputation in the UK where we have operated for the



longest, but we're not well known outside of it. A key aim of our brand strategy is to establish Wellcome with new global audiences (our specific geographic focus is to be confirmed).

## Review objectives

Responsibility for WGM has moved to Wellcome's Public Initiatives team (part of Brand) and we're working to turn it into an effective vehicle for building brand equity. We need a strategically focused agency to help us.

Our ambition is to leverage WGM to improve awareness, understanding, and support for Wellcome's vision and strategy, it should:

- Significantly increase awareness of Wellcome
- Improve knowledge and understanding of our work supporting discovery research and tackling the health challenges
- Link our brand to the specific areas within the health challenges where we feel we can make a difference (e.g. supporting curiosity-driven research, driving a step-change in early interventions for anxiety, depression and psychosis, preventing or rapidly stopping escalations of infectious diseases, and averting catastrophic climate change in a way that allows everyone's health to flourish)

We've split the review into two phases of work. The first will determine the feasibility of establishing WGM as a cost-effective channel that reaches our target audiences at scale, and ensures our brand is strongly associated with our mission, the health challenges and discovery research. It will also identify potential alternative initiatives that could better improve brand equity.

Phase 1: scoping and feasibility, will:

- Compare WGM with external benchmarks (e.g. UNICEF's State of the World's Children Report, the Edelman Trust Barometer) and assess how successfully WGM has increased our target audiences' awareness of Wellcome
- Examine how other brands successfully use public opinion research and reports to build brand equity, and identify lessons from these projects that could help Wellcome raise awareness and understanding of our mission and work
- Identify overlaps between Wellcome's goals for the health challenge areas and the needs of our target audiences that could provide opportunities to grow our brand equity through public initiatives
- Develop a clear picture of what our target audience needs from an initiative like WGM (e.g. what data, how often, in what format?)
- Define long-term objectives for WGM that move it from a data driven project to a (methodologically sound) vehicle for building brand equity that gives equal weight to storytelling and data insights
- Scope alternative initiatives that could improve our brand equity more effectively
- Identify opportunities for improvement and barriers / challenges to success



Recommendations based on the scoping and feasibility phase will be presented to Wellcome in the week commencing 5 September. All options must be globally representative, capture people's lived experience of health and fit with our [anti-racist](#) and anti-ableist principles. Phase 2 will develop the delivery plan and tactics for our preferred option.

Phase 2: developing the public initiative, will:

- Develop a delivery plan for an initiative that will act as a 'calling card' for Wellcome and increase brand equity
- Recommend tactics and resource requirements for the delivery of the initiative that will ensure it delivers against its objectives, appeals to our target audiences at scale, and build brand association with the health challenges and discovery research. (E.g. frequency of reporting, geographic scope, partnership opportunities, promotional budget)

The delivery plan and tactics recommendations will be presented to Wellcome in the week commencing 3 October.

## **2. RFP Specification**

### **Goods and services we need**

We need an agency/ consultant to provide the following services:

- Review past evaluation and planning documents
- Run workshops and face-to-face interviews with internal and external stakeholders, and representatives from our target audiences. These sessions will gather insights on important factors that influence the success of an initiative like WGM, such as:
  - Where are there overlaps between Wellcome's strategic priorities and the needs and interests of our target audiences that could provide opportunities for a WGM style initiative?
  - How often should we run the initiative and how long a lag between field work and publication is acceptable?
  - How important are consistent, year-on-year, themes and metrics to our target audience?
  - How geographically broad should the survey sample be to remain globally representative and useful to our target audiences?
  - What frequency of reporting is most useful for building brand equity? (E.g. one annual report covering all findings, or more regular reports covering specific topics)
  - What formats do our target audience prefer? (E.g. formal reports, blog articles, infographics, podcasts, webinars)
  - Who could Wellcome partner with to help us reach our target audience?



- What do internal stakeholders need from WGM? How can we make it more useful for them?
- Carry out market research – how do other brands use research and reports to build brand equity? (e.g. the Edelman Trust Barometer). Is there a demand for more public opinion data and research on Wellcome’s specific areas of interest? If yes, how can we capitalise on it to build brand equity and remain consistent with Wellcome’s priorities?
- Facilitate a workshop with the WGM team and key internal stakeholders to develop long-term objectives for the initiative
- Present WGM/ alternative public initiative options to the Brand team and Corporate Affairs Leadership Team
- Develop a delivery plan and tactics for WGM / alternative public initiative, including resource and budget requirements

## **Budget**

Please outline the budget required to deliver the goods and services we need in your presentation.

As a charitable foundation, value is very important to us. Agencies who share our values and can provide demonstrably exceptional value for money will be at an advantage.

## **Resources and people to support your work with us**

Your main point of contact will be the Public Initiatives Lead, who will work with our in-house team to ensure that you have the information and access to stakeholders you need to successfully deliver the review.

Pre-existing insights include:

- ‘Why, What, How’ documents for each health challenge and discovery research
- WGM strategy and evaluation documents covering the first two waves
- Findings and transcripts from 45 in-depth interviews carried out between September 2020 through to March 2021. The interviews focused on stakeholders at different institutions who made use of the WGM 2018 findings.
- Existing audience insights and personas
- Brand baseline research
- Stakeholder mapping
- Analytics data

## **3. RFP Timetable**

<b>#</b>	<b>Activity</b>	<b>Responsibility</b>	<b>Date</b>
1	RFP issue to Suppliers	WT	11 May
2	Submission of expression of interest to RFP	Supplier	27 May, 5 pm BST



3	Submission of Supplier Q&A to Wellcome Contact (via Email)	Supplier	27 May, 5 pm BST
4	Return of Supplier Q&A to Suppliers	WT	06 June
5	Submission of Proposal Overview	Supplier	13 June, 5 pm BST
6	Shortlisted suppliers invited to present	WT	17 June
7	Shortlisted supplier briefing		22 June, pm
8	Supplier Presentations	Supplier	w/c 04 July
9	Notification of Contract Award	WT	w/c 11 July
10	Contract Negotiation	WT & Supplier	w/c 11 July
11	Contract Start Date	WT & Supplier	w/c 25 July

#### **4. Response Format**

##### **Expression of Interest**

Suppliers are asked to submit a short expression of interest by e-mail to the Wellcome Contact in accordance with the RFP timetable.

##### **Supplier Q&A**

Prior to the submission of your RFP response, Suppliers are provided the opportunity to submit any questions they have about the exercise. All questions are to be submitted to the Wellcome Contact by e-mail in accordance with the RFP timetable. All supplier questions will be collated, anonymised, answered and shared with all suppliers within the process to ensure they are all operating with the same level of project information.

##### **Proposal Overview**

Suppliers are asked to submit a short overview of their proposal (no more than ten PowerPoint slides, or five pages in a Word document) by e-mail to the Wellcome Contact in accordance with the RFP timetable.

The overview should cover:

- Examples of relevant experience
- How the brief will be met
- How Wellcome's commitment to Diversity and Inclusion will be brought into the process

Following review of the Proposal Overview shortlisted suppliers will be invited to a Supplier Briefing and Supplier Presentations.

##### **Supplier Briefing**

Shortlisted suppliers will be invited to a briefing on the project with the opportunity to ask further questions.



## Supplier Presentations

Presentations will last one hour, with up to 40 mins for presentations and 20 mins Q&A/discussion. Where possible we want to meet the team that we would be working with on a day to day basis.

### Contract Feedback

This section allows Suppliers to 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 [this 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).

## 5. Information Governance, 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.

We assume no personal information will be processed as part of this contract. If this changes, we will need to inform Wellcome's Data Protection Officer and vet your data protection governance.

## 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. Sustainability**

Wellcome is committed to procuring sustainable, ethical and responsibly sourced materials, goods and services. This means Wellcome seeks to purchase goods and services that minimise negative and enhance positive impacts on the environment and society locally, regionally and globally. To ensure Wellcome's business is conducted ethically and sustainably, we expect our suppliers, and their supply chains, to adhere to these principles in a responsible manner.

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



### **13. Diversity & 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. 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:	Andrew Thompson
Role:	Public Initiatives Lead
Email:	a.thompson@wellcome.org