



Request for Proposal (RFP) for a digital marketing agency

1. RFP Background & Objectives

Hello. We're the Wellcome Trust. We are a politically & financially independent charitable foundation. We fund health and science research, about £1BN each year to give you a sense of the scale. But we're not a traditional charity like Oxfam or Cancer Research because we don't fundraise for donations; our work is funded by an endowment and managed by an investment portfolio. The endowment today stands at around £39BN.

In October 2020 we set out our new [strategy](#) and vision to '**support science to solve the urgent health challenges facing everyone**'.

The strategy, which explicitly places science at the heart of everything we do, was informed by the [Wellcome Science Review](#). This concluded that Wellcome-funded science should enable science and innovation to tackle the greatest threats facing humanity, and it should do so through a broad programme of [Discovery Research](#) together with research directed at three specific health challenges: [Infectious Disease](#), [Mental Health](#), and [Climate and Health](#). These challenges were selected based on the urgency and scale of the threat, and the opportunity for Wellcome to make a difference.

Together, the strategy and vision provide a clear focus for Wellcome, consolidating our work and aligning the whole organisation to achieve a smaller number of clear ambitious goals.

Part of Wellcome, [Wellcome Collection](#) is a free museum exploring health and human experience. It offers a changing programme of curated exhibitions, museum and library collections, public events, as well as a café, reading room and soon-to-reopen shop.

Whilst science sits at the heart of Wellcome's new vision and strategy, Wellcome has always recognised that science, health and medicine exist within social and cultural contexts giving us a unique perspective compared to other science and health organisations. Wellcome Collection has recently developed new ten-year vision and mission statements which contribute to Wellcome's overall strategy.

Wellcome Collection's vision is: "A world where everyone's experience of health matters" with a mission to:

- Seek out opportunities for everyone to contribute different forms of knowledge and understanding towards a healthier and more equitable future;
- Give voice to a radical imagination of what health is and what it could be;
- Make meaningful connections between different perspectives and stories of health past, present and future, with our collections at the heart.

2. RFP Specification

This section sets out the specification of appointing an agency to manage Wellcome's digital marketing activity for this RFP exercise. Suppliers should use this section to fully understand Wellcome's requirements and to inform their response.

We are looking to appoint an agency to manage digital marketing activity for both Wellcome Trust and Wellcome Collection. There is scope for this to be a long-term/ongoing relationship



where the right partner becomes an extension of Wellcome's in-house team and develops a deep understanding of our organisation.

There are a couple of urgent/immediate priorities for the successful agency to begin working on upon appointment.

1 - Funding calls: a funding call is an opportunity for an individual or team to apply for money from Wellcome to fund their research. We are conscious that some of our upcoming funding calls are on topics Wellcome has not historically funded (e.g. Mental Health and Climate & Health). We therefore want to use digital marketing to diversify our applications by reaching people who are unaware / unfamiliar with Wellcome and who don't know our funding is available.

The next upcoming funding call will be early next year and will be for mental health stratification i.e. looking to do for mental health something similar to what we have for other diseases like cancer, where we can arrange/classify the disease, treatment, response etc.

2 - Wellcome Collection: the Collection is still recovering from the loss of footfall post-pandemic. In August our footfall was just over 29k, which is 54% of pre-pandemic (August 2019) figures. Our priority for Wellcome Collection's digital marketing is to help grow our visitor numbers, particularly as we revert back to consistent exhibition offerings. We also want to promote the reopening of our gift shop in October.

Looking further ahead, the first end-to-end campaign we would like you to run for us is our next exhibition, 'Milk', which will open on 30th March 2023. This exhibition will question our changing relationship to milk in all its forms: in mythologies, rituals, and culinary traditions from around the world, and in the modern era its image deployed everywhere from pop culture to propaganda.

There may also be light-touch or cross-promotion opportunities supporting our broader portfolio/offer, including books, collections, events, library, youth/schools, touring, digital '[stories](#)' (i.e. content), café, and venue hire.

More generally, we are looking for support with:

Campaign planning and account management

- Working with us to plan campaigns for Wellcome Trust and Wellcome Collection, including channel, creative and targeting recommendations, budget splits and forecasting;
- Ongoing campaign builds and campaign management/optimisation e.g. adjusting bids, budgets and targeting to maximise ROAS;
- Willingness and agility to pick up other ad hoc campaign activity as required and flagging opportunities we may have missed: this could include amplifying earned media activity with paid, boosting organic posts, or testing the promotion of new formats.
- Applying our inclusive communications principles and ensuring inclusivity and equity are built into how we communicate, particularly with regards to anti-racism and anti-ableism.
- [Occasional] Negotiating, implementing and monitoring direct deals with publishers for e.g. homepage takeovers/skins. (Final figures approved by Wellcome prior to being agreed with suppliers.)



Testing, reporting and evaluation

- Implementing a robust testing strategy for activity (particularly qualitative ad performance and audience/targeting performance);
- Consistent campaign reporting, including automated campaign reports accessible throughout a campaign to monitor progress, and end of campaign reports with clear actionable recommendations for future activity;
- Evaluating paid activity in the context of the overall digital ecosystem (i.e. including owned & earned).

Technical and consultancy support

- Merging Wellcome Trust and Wellcome Collection Meta business suites;
- Supporting us to implement tracking/tagging on wellcome.org and wellcomecollection.org; potentially implementation of GTM. This may include advising senior leadership about security, legal/GDPR/privacy concerns and technical considerations.
- Ad hoc troubleshooting of other technical issues;
- Helping us to explore new channels, e.g. TikTok, and to understand the overall channel mix that serves us best;
- Opportunities to tap into industry best practices, platform betas, or access to platform reps would be welcome;
- [Long term] Building a data-driven attribution model so we can understand the value of different channels.

Management of Google Ads Account

- Full audit, rebuild and ongoing management of our Google Ads account to maximise our grant;
- Potential to set up a non-grant account from scratch.

Audience development

- Identifying, defining and building audiences across platforms that we can use consistently in campaigns.
- Reaching and engaging diverse audiences with different access needs, both in terms of physically accessing the Wellcome Collection, and being able to reach this audience through innovative approaches to digital ads.
- Understanding Wellcome Collection's audience segmentation and emerging audience development plans.

Training

- Building capacity internally, i.e. support us to develop a better in-house understanding of digital marketing, potentially with more hands-on platform training for a smaller, specialist group.

3. RFP Timetable

| # | Activity | Responsibility | Date |
|---|---|----------------|---------------------------------|
| 1 | RFP issue to Suppliers | WT | 15 th September 2022 |
| 2 | Submission of: A) Expression of Interest to RFP B) Supplier questions to the Wellcome Contact (Elizabeth Atkin) | Supplier | 21 st September 2022 |



| | | | |
|---|---|---------------|-----------------------------------|
| 3 | Return of Supplier Q&A to Suppliers | WT | 26 th September 2022 |
| 4 | Submission of: A) Full RFP Response B) TPSRA2 Form C) Supplier's own Terms & Conditions document if Supplier unable to use Wellcome's standard document D) Confirmation from supplier that they are happy for their presentation to be recorded by Wellcome (if successful at shortlisting stage) | Supplier | 10 th October 2022 |
| 5 | Notification of suppliers successful at shortlisting stage | WT | 12 th October 2022 |
| 6 | Supplier Presentations | Supplier | w/c 17 th October 2022 |
| 7 | Notification of Contract Award | WT | 21 st October 2022 |
| 8 | Contract Negotiation | WT & Supplier | w/c 24 th October 2022 |
| 9 | Contract Start Date | WT & Supplier | 1 st November 2022 |

4. Response Format

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

Expression of Interest

Suppliers are asked to submit a short expression of interest by email to the Wellcome contact (Elizabeth Atkin) in accordance with the RFP timetable which should contain the following information

- Confirming whether you are a company or individual;
- If a company please provide: full company name, address, and company registration number.

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 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 has 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.

RFP Proposal

Suppliers are required to submit proposals which respond to the following sections;

RFP Questions

This section requests responses from Suppliers specific questions in relation to this RFP exercise.

Please feel free to send us your commercial response using any format you like, e.g. slides, diagrams, bullet points. For the benefit of both sides, we're very happy to keep answers concise.



First and foremost, we are a charity. Value is important to us, as is working with people who share our values and our commitment to making a difference. The more cost-effective we can be, the more likely it is that we can demonstrate impact and invest longer-term.

| # | Question |
|---|--|
| 1 | Describe how you propose to meet our requirements and what makes you best placed to do so. |
| 2 | Provide an overview of your organisation including any differentiators (as they relate to Wellcome, its sector and the services we are seeking). |
| 3 | Provide at least one case study of where you have successfully provided services similar to those described in this request for proposal. |
| 4 | Provide a cost proposal and demonstrate how you would ensure maximum value for money for Wellcome. |
| 5 | Provide the key performance indicators which you propose to be measured against. |
| 6 | Explain what you do to drive diversity and inclusion in your organisation. Include indicators of progress if you have them. |
| 7 | Indicate whether you have capability either in house or through managing third-party suppliers or contractors to create content (copy/creative) in house, if required by Wellcome for certain campaigns. |
| 8 | Demonstrate how you will ensure that the services provided will comply with data privacy legislation, including GDPR and PECR. |

Proposals will be assessed against the following criteria:

| | | |
|---------------------|---|-----|
| Skills & Experience | Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work? | 30% |
| Methodology | Coverage: How well are the desired focus areas (as outlined in the specification) covered in the proposal? Quality: Is the proposed methodology aligned with our needs? Utility: Will the proposed methodology deliver the desired, credible, and useful results? | 30% |
| Delivery & Outputs | Communication: Is there a good plan for communicating with the Wellcome team? Delivery plan: Is the proposal appropriate and achievable? Feasibility: Are there any significant risks identified and, if so, how well are they mitigated? | 25% |
| Value for Money | Does the proposal represent good value for money? | 15% |

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 [Wellcome's Terms and Conditions](#).

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 7 below).

If you cannot contract on Wellcome's Terms & Conditions, please submit your own Terms & Conditions document for Wellcome to review when you submit your RFP response and [TPSRA2](#).

Supplier presentations

Supplier presentation meetings will be one hour in length, with a maximum of thirty minutes for the presentation and the remaining time for questions from the team at Wellcome.

We would like to record all presentation meetings on Teams to allow wider team members to feed into the consideration process. **Please confirm if you agree for your presentation to be recorded.**

Your presentation should include:

- A brief introduction to your agency (max. 5 mins) – where possible we want to meet the team that we would be working with on a day to day basis;
- Your recommended approach to the RFP specification, considering the questions above (see 'RFP Questions')
- At least one case study of how you've tackled a similar challenge previously
- Highlight to us any risks which you foresee with meeting Wellcome's requirements.

Wellcome Data Protection Compliance

Under GDPR/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 GDPR article 30 requirements.

Suppliers are asked to complete the [TPSRA2](#) assessment before the RFP submission deadline for Wellcome to assess how you handle data.

5. 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.

6. Prospective Suppliers Personnel - IR35 and Off Payroll Working Rules

Before the RFP response deadline, Prospective Suppliers must make the Wellcome Contact (Elizabeth Atkin) 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). 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: | Elizabeth Atkin (she/her) |
| Role: | Digital Marketing Lead |
| Telephone: | 020 7611 2082 |
| Email: | e.atkin@wellcome.org |