



Request for Proposal (RFP) for pilot of campaign activities on climate and health

RFP Background & Objectives

The context

The Wellcome Trust is a politically and financially independent charitable foundation. We fund health and science research. Our work is funded by an endowment and managed by an investment portfolio.

Wellcome has developed a new strategy to support science to solve the urgent health challenges facing everyone. We will 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.

The challenge

Wellcome has some experience in short-to medium-term campaigning, particularly in infectious disease and changing research culture. As an organisation we are relatively new to climate campaigning.

In 2023 Wellcome will develop and launch an agenda-setting campaign to increase propensity to protect and enhance health through climate actions amongst policymakers, politicians, and practitioners by ensuring they perceive these issues as salient, urgent, and relevant.

These climate actions could include:

- **Mitigation actions** which are motivated by or contribute to enhancing health.
- **Adaptation actions** which protect or enhance health.
- **Financing** mitigation or adaptation actions.

To do this, Wellcome will need to develop an integrated campaign which uses a variety of campaign approaches to achieve our outcomes. As Wellcome is relatively new within the climate and health space, we will need to focus on which approaches Wellcome is best placed to use and consider what gaps or limitations we may experience.

The Project

We would like to engage a supplier to conduct a series of pilot campaigns activities to surface, test and generate learnings around diverse approaches that Wellcome can take to campaign on climate and health. The supplier will work with us to create a robust testing approach and to deliver campaign activities in 1 or more geographies that focus on **putting health at the heart of climate action**. As the testing approach is refined, we will identify



whether the campaign activities focus on mitigation, adaption or financing (mitigation or adaptation).

The testing activity must assess Wellcome's capability to increase the propensity of audiences to engage in climate action when framed through a health lens. Several audience insight studies have shown that health frames for climate action are amongst the most persuasive frames for increasing the likelihood of support for climate policies, however, there remains little evidence to support this.

The campaign test activities must be framed around the four campaigning roles that Wellcome has identified to advance its integrated influencing efforts – Thought Leader, Amplifier, Convenor, Funder (see **appendix** for details of campaign roles p.11-12). All activities will be selected through the creation of the testing framework and how this will inform the wider campaign.

The selection of geographies for these activities will be shaped by several factors (see criteria outlined under **scoping** p.3).

Monitoring and evaluation throughout the project should help us assess whether the narratives and tactics are working. The appointed agency partner will help us design the testing approach and how we will evaluate the success of the pilots.

The insights from this project will inform Wellcome's long-term approach to delivering our agenda-setting campaign which will launch in late 2023.

The objectives

1. To deliver campaign activities that can contribute to increasing the propensity of audiences to engage in climate action when framed through a health lens.
2. To surface, test and generate learnings around diverse approaches that we can take to campaign on climate and health.

Summary insight

Wellcome commissioned the agency, Portland, to conduct research into trends and perspectives in campaigning. The key campaigning insights on climate and health included:

1. **Revealing the health impact makes climate change more tangible.** The research highlighted that building awareness of the immediate health risks posed by climate change – either through creative tactics or clear messaging – would help to increase urgency and commitment from the public, ultimately leading to greater pressure on policymakers.
2. **Global platforms should elevate local perspectives on problems and solutions.** A focus on local perspectives can help to reduce inertia by both ensuring that climate change is not seen as a distant issue – or 'someone else's problem – and for ensuring that asks are proportionate and reflective of nuances in culture and economic levels, while still working towards a common goal.



3. **Making climate change personal and visible drives urgency.** Some of the most effective campaigns highlight the immediate impact of climate change and make it clear who action will benefit – personalising the issue.
4. **New advocates are required to turn awareness into action.** Representation of different genders, socio-economic classes, and ethnicities would help making the issue of climate change more relevant and tangible to the different communities that are affected or who are being asked to support solutions.

1. 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.

We would like to appoint an agency to develop, implement and evaluate a series of pilot campaign activities, and help us develop our strategic thinking, to inform Wellcome’s approach to delivering our long-term agenda-setting campaign which will launch in late 2023.

This work will include:

1 – Scoping: The scoping phase will build on the existing work we have already undertaken and identify what activities will be tested. This will include:

- Reviewing Wellcome’s existing climate and health evidence review.
- Reviewing Wellcome’s existing scoping work on geographies for campaigning.
 - We will have a final list of prioritised geographies by the end of February 2023.
 - Examples of markets in our scoping work to-date include Germany, UK, France, Brazil, Japan, USA, Kenya and Caribbean SIDS/Barbados.
 - The scope of this project will cover up to two geographies which could be in the global north and the global south.
 - We would expect a supplier to demonstrate where they have geographical coverage (existing campaigning infrastructure and/or partner relationships).
- Working with internal stakeholders to define a robust testing approach.
- Opportunity analysis based on the issue.
- Identify and prioritising a set of activities which are relevant to climate and health and are salient within the geographies agreed upon. Illustrative examples include, mobilising health advocates, white label campaigns and amplifying existing networks.
- Mapping existing campaign approaches within the climate and health space and identify ways for Wellcome to accelerate solutions. We will also need to explore what gaps exist, and whether Wellcome has the capability to provide new solutions to fill these gaps.



2 – Testing: The project will test 2-4 campaign activities, in 1 or 2 geographies, over a 6-month timeframe. The climate actions should focus on mitigation, adaption or financing (mitigation or adaptation). The pilot activity must assess Wellcome’s capability to increase the propensity of audiences to engage in climate action when framed through a health lens.

To do this, we will require:

- A testing framework that will outline the methodologies and criteria that will be used to assess the success of campaign activities.
- To test campaign activities and their impact on reaching and engaging policymakers, politicians, and practitioners.
- A method to generate and capture learnings and use insights to inform and strengthen Wellcome’s long-term campaign approach.

3 – Evaluation: The supplier will develop a testing mechanism and framework to monitor and evaluate the pilot campaign activities that will be used. The insights should feed into the development of our long-term campaign approach in real-time. This will require analysis of learnings so that the following options can be considered:

- **Routes to scale** – which approach(es) should Wellcome decide to expand and build on to use in our agenda setting campaign?
- **Routes to adapt** – which approach(es) should Wellcome modify to best serve the agenda setting campaign?
- **Routes to exit** – which approach(es) Wellcome should not take further into our long-term campaign approach?

To note depending on the selection of campaign activities, roles and responsibilities regarding data collection will need to be agreed between Wellcome and the appointed supplier.

4 – Conclusion: The results from the project should contribute to intermediary outcomes that will inform and strengthen Wellcome’s long-term campaign approach. The supplier will provide a final report that surfaces key learnings from the activities deployed.

The report should cover:

- What campaign roles and campaign activities were deployed?
- What are the implications of each campaign activity?
- What signs were there that an approach was working?
- For each pilot, are there any strengths that Wellcome can draw on and gaps/constraints that need to be addressed/considered?
- From the insights gathered, how can Wellcome translate and apply the learnings to different contexts, geographies, and audiences for the long-term agenda setting campaign?



The supplier will produce a final report and an editable PowerPoint presentation. To share the findings the supplier will deliver socialisation sessions with partners that participated in the project and to Wellcome's internal stakeholders:

- 2x socialisation sessions with key partners who participated in test campaigns.
- 1x with internal stakeholders at Wellcome.

Ways of working

The supplier will deliver the project in close partnership with Wellcome. Wellcome's Campaigns Team would work together with the supplier's team (s) to deliver the project. The partnership will include regular communication between Wellcome and the supplier, with the active inclusion of our campaigners in the planning, development and delivery of the project.

Embedding equity, diversity and inclusion in the pilot of campaign activities

At Wellcome, equity, diversity and inclusion are fundamental to delivering our mission to improve health. Our chosen supplier will be required to demonstrate:

- Alignment with Wellcome's [anti-racist](#) principles, anti-ableism as well as our overall [Diversity and Inclusion strategy](#).
- Alignment with Wellcome's Inclusive Communications Principles and Diversity, Equity and Inclusion considerations in our Campaign Toolkit (a guide to campaigning at Wellcome).
- Contribute to shifting power in social, economic and political systems which affect climate and health action by working with organisations representing minoritised and affected communities.
- Demonstrate a commitment to equity, diversity and inclusion within their own organisation as well as in their proposal.
- Ensure that equity, diversity and inclusion considerations are embedded throughout the planning, development and delivery of each phase (scoping, testing, evaluation, conclusion), and not as an add-on to the project.
- Commit to monitoring and evaluating the effectiveness of equity, diversity and inclusion throughout the project.

2. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT	17 January 2023



2	Submission of expression of interest to RFP and Q&A submitted to Wellcome Contact	Supplier	31 January 2023
3	Return of Supplier Q&A to Suppliers	WT	9 February 2023
4	Submission of RFP Response	Supplier	16 February 2023 (9am)
5	RFP Evaluation Period	WT	16 February – 27 February 2023
6	Notification of short-listing	WT	28 February 2023
7	Supplier Presentations	WT & Supplier	6 March – 10 March 2023 (exact date TBC)
8	Notification of Contract Award	WT	20 March 2023
9	Contract Negotiation	WT & Supplier	End of March/Early April 2023
10	Contract Start Date	WT & Supplier	April 2023

3. 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 e-mail to Natalie Idehen at: n.idehen@wellcome.org in accordance with the RFP timetable, which should contain the following information:

- Confirming whether you are a company or individual, if company please provide Full company name, address, and company registration number.
- A non-binding cost estimate as a single figure in GBP.

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 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.



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.

#	Question	Max [Words/Pages]
1.	What is your experience in climate/climate and health campaigning?	25 pages max. for the full proposal.
2.	Provide 2x case studies of where you have successfully provided services similar to those described in this request for proposal.	
3.	Do you have any constraints/limitations on the types of campaigning activities that you would be able to deliver?	
4.	Describe your proposed framework (s) for scoping, testing and evaluation?	
5.	Where do you operate geographically, and what existing infrastructure and partner relationships do you have in these geographies?	
6.	The pilot campaign activities will run over a 6-month period. Describe the phases and timeframes in which you propose to meet our requirements.	
7.	How would you ensure equity, diversity and inclusion considerations are embedded throughout the planning, development and delivery of the project?	
8.	We require a supplier that would work in partnership with Wellcome's Campaigns Team. Outline how you intend to work closely and collaboratively with Wellcome's Campaigners.	
9.	Provide your cost proposal for each phase (scoping, testing, evaluation & conclusion) based upon the requirements set out within this procurement exercise setting out; a) Cost breakdown b) Supporting description of the application of financials	

	c) Timeframe of activity/phase	
10	Outline any third-party relationships you will utilise. Who will have access to the data? How is data secured? Both in transit and at rest.	
11	Provide an overview on your approach to risk management.	
12	Wellcome uses Microsoft Office systems. Describe which software's and systems you intend to use, any limitations it poses for collaborative working, and how you plan to mitigate these limitations.	

Proposals will be assessed against the following criteria:

Methodology (30%)	<p><i>Coverage:</i> How well are the desired focus areas (as outlined in the specification section) covered in the proposed methodology?</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>
Experience (20%)	<p><i>Skills and Experience:</i> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?</p>
Delivery & Outputs (20%)	<p><i>Communication:</i> Is there a good plan for engaging with the Campaigns 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>
Equality, Diversity & Inclusion (20%)	<p><i>EDI:</i> How well does the supplier embed Equality, Diversity and Inclusion across Methodology, Experience, Delivery and Outputs in-line with our EDI considerations?</p>
Budget (10%)	<p><i>Value for Money:</i> Is the proposed work within budget and good value for money?</p>

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 5 below).

Information Governance

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 will be asked to complete the [TPSRA2](#) assessment if invited to Presentation stage, and will need to submit this before the meeting for Wellcome to assess how you handle data.

Supplier Presentations

Following submission of RfP responses, successful applicants will be invited to a virtual meeting which will last 60 minutes in total and will include a PowerPoint presentation followed by a question-and-answer session.

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.

4. 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.

5. 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.

6. 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.

7. Funding

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

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. 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.

10. 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/collections/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.

11. 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.

12. 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.

13. Wellcome Contact Details

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

Name: Natalie Idehen
Role: Campaign Lead
Email: n.idehen@wellcome.org

14. Appendix

Wellcome advances evidence-based campaigning through 4 campaign roles:

Thought leader

Wellcome draws on its expertise, knowledge, and experience in relevant fields, as well as that from the research community in order to inform agendas and advocate for shared goals.

Amplifier

Wellcome uses its platform and influencing power to elevate issues, and amplify



and advocate for the voices of affected and excluded communities.

Convener

Wellcome brings together external stakeholders across the power spectrum, drives coordinated action toward shared goals, and builds capacity within and across sectors over time.

Funder

Wellcome identifies and directly funds new and existing initiatives, in order to strengthen, replicate and scale campaigning efforts