

# Request for Proposal (RFP) for Audience insight for Wellcome's Infectious Disease campaign

## 1. RFP Background & Objectives

### *The context*

Wellcome supports science to solve the urgent health issues facing everyone. We fund curiosity-driven research, and we're taking on three of the biggest health challenges facing humanity – climate change, infectious disease and mental health.

We want to use our influence to remove barriers to achieving Wellcome's objectives, with a campaign that builds support for change and drives action.

We need audience insight because there is a gap in our knowledge about the audiences that we need to reach and engage with for our infectious disease campaign. This insight will inform potential campaign ideas that will engage our audiences, influence their thinking and inspire them to take action.

### *The challenge*

The world waits for infectious diseases (ID) to escalate before it acts. This increases their risk and impact, disproportionately affecting marginalized communities and those in low resource settings.

Wellcome is working towards the ultimate goal that fewer people suffer the consequences of infectious diseases. That means reducing their risk and impact.

To reduce risk, the world needs to act earlier, before diseases escalate. To reduce impact, action to predict, detect and mitigate infectious diseases must be effective and equitable.

### *Our campaign*

We are building a campaign which will lay the groundwork for decision-makers to understand escalating ID, build their willingness to act and their ability to do so using effective tools. This translates to the following short to medium term objectives:

1. Increase awareness of the problems and solutions within the research and development (R&D) ecosystem by highlighting key research or activity that brings the problem home to decision makers and links it to the issues they care about
2. Make the case for a more effective and equitable R&D ecosystem, with a focus on industry and government buy-in to Wellcome's vision in the next two to five years
3. Bring Global North and Global South stakeholders together to identify actions they can take within the wider ID ecosystem to prevent escalating infectious diseases, ensuring communities most affected are centered in the conversation

This work will primarily focus on campaign objectives 1 and 2.

To meet objective 3, we will be working with a co-creation agency to identify, understand and work with stakeholders from our target countries – such as communities most affected and our grantees.

We want this supplier to work with the co-creation agency and our internal team to refine campaign ideas and to develop a creative brief that meets all three objectives.

## 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.

### *Objective:*

To conduct foundational audience research within our target countries to provide insights that will help inform our infectious disease campaign, that are interpreted into potential campaign ideas.

### *Scope of requirements*

The research should help us to:

- 1) Inform our campaign strategy including identifying unexpected key levers for change and barriers to overcome that can be the basis of a potential campaign idea
- 2) Better understand what these audiences think, feel and do in relation to the issues we are campaigning on and how these fit with their priorities
- 3) Better understand what we need to do to engage with these audiences to have our intended outcome, including potential campaign ideas and messaging

### *Audiences:*

Our priority audiences will be policymakers and industry in the UK and the US. We have chosen these audiences because they meet the following criteria:

- Influence on ID decision making, response or discourse
- Influence on R&D norms and practices
- Influence on Global Health policy
- Potential blockers for change
- Existing relationship with Wellcome

Here are examples of who we think this will include:

<b>Policymakers</b>	<b>Industry</b>
Director level civil servants/SPADs within Department of Health and Social Care (UK) including their international team, and Centre for Disease Control and Prevention (US) e.g.	Pharmaceutical companies and manufacturers, e.g. Johnson & Johnson, Merck, Pfizer, Moderna, AstraZeneca, GSK plc, International Federation of

Henry Walke, Denise Cardo, Rochelle P Walensky (US)	Pharmaceutical Manufacturers and Associations
Finance departments and ministers in UK e.g. HMT and in US similar bodies e.g. NIH, USAID, Biosecurity Council	Regulators, e.g. European Medicines Agency, FDA, MHRA
Science and research government departments – Department for Science, Innovation and Technology (UK), Government Office for Science (GOScience) (UK) and Office of Science and Technology Policy (US)	Global networks, e.g. Global Fund, GPEI, Measles and Rubella Initiative
Technical officers in US and UK governments	Research organisations and funders e.g UKRI
Government aid e.g. Development Directors in Foreign, Commonwealth and Development Office (UK) and USAID (US)	
MPs e.g. backbench/select committee members/Lords in the UK	
Federal/state/municipal leaders in the US	
Opposition ministers	

### *Research questions*

These are the key questions for this project to answer about policymaker and industry audiences:

Responding to campaign objective 1:

- What is our audience's perception of how change happens within the current R&D ecosystem and what opportunities are there to shift perspectives, actions, and feelings in relation to escalating infectious diseases and access?
  - What do they think drives change to happen within the current R&D ecosystem?
  - What issues do they consider when making decisions? What are their motivating factors?
  - What are their blockers / barriers?
  - Who are their influencers? Where are these influencers present?
  - What are the trusted sources of information, trusted by whom?
  - Where and how are the most affected communities represented? How are their views being considered?
- What are our audience's current beliefs, understanding and priorities within escalating infectious disease?
  - Are escalating infectious disease a priority for them? What are their current priorities and drivers within their roles and remit?
  - Do they understand the different types of escalating infectious disease? Are there stronger focus on one type of escalating infectious disease over the other, and why?
  - Do they think the R&D ecosystem is more or less prepared for different types of escalating infectious diseases?
  - At which point of escalation would they prioritise the issue?

- Is the understanding and prioritisation the same across the UK and the US? Is it the same for industry and policymakers? What are the factors constituting these differences?

Responding to campaign objective 2:

- What is our audience's current perception of the R&D ecosystem?
  - How do they understand the importance of equity and access? What value do they place on that versus other issues?
  - What do they see as the problems within the system? What are the potential solutions? What stories, examples and proof points reinforce their views?
  - Is there consensus of what these problems are?
  - How do they perceive the role they can play to fix the problem and what would persuade them to act or feel differently?
- What are the key levers for change that our campaign should draw upon to encourage our audiences to take action on reforming the R&D ecosystem?
  - What do they currently think, feel, and do about the issue?
  - What are there are frames that may change their minds?
  - Who are the messengers that would persuade them to change their minds?
  - What do they see as the current barriers to change and what could remove those barriers?
  - How do these levers for change differ across the UK and the US?

*Methodology:*

We'd like to understand how you would approach this brief to meet our campaign objectives within the timetable outlined below.

We are open to your recommended method. We expect this will include a mixture of qualitative and quantitative research. We expect the supplier to be able to secure interviews without relying on Wellcome to have existing contacts.

We want to partner with organisations who share our commitment to fair and equitable practices, both in their internal culture and the way they do work. With this in mind, we would like to know the equity, diversity and inclusion considerations that will be part of your methodology. This could include, but is not limited to, how your team works together in inclusive and equitable ways, how you will engage diverse stakeholders, how you will ensure participation in interviews is accessible and how you will manage bias in your analysis.

The research needs to be as future-proofed as reasonably possible, so we can use it for at least 3-5 years.

*Potential deliverables:*

We've suggested some potential deliverables in line with this brief. However, your recommended method may impact the deliverables we'd need, and we are open to your thoughts.

- A write up and presentation of interim findings ahead of the full report
- A report to meet the scope of requirements that provides actionable insights that can inform a campaign strategy
- Comparisons between different countries and audience groups
- A PowerPoint summary of key findings and recommendations
- Up to 3 potential campaign ideas (expressed in a few paragraphs or sentences and/or images, not full creative) based on the insights, that we could test in the future to inform a creative brief, and a set of recommended messages for these audiences
- A creative strategy workshop devised and run by you, with Wellcome staff and key stakeholders attending, that can bring together and refine potential campaign ideas into a creative brief
- A briefing meeting with a creative agency that will implement the creative brief

*Timeline and budget:*

We would like this to start in April, subject to contracting, and be completed in October 2023. We would like updates during the research and interim results in August to allow for refinements and feedback from our team.

Please include a detailed budget breakdown and a justification of the total cost in your proposal. We do not want to limit innovation or your ambition, but as a charity, value is very important to us. Agencies who share our values and provide demonstrable value for money will be at an advantage.

*Co-ordination:*

We will be working with teams on other elements of the campaign, which won't be in scope for this project but will require coordination and some joint working. This includes:

- **A co-creation agency** to identify and work with stakeholders – such as communities most affected and our grantees – to build our campaign.
- **A Campaign Advisory Group** with global campaigners to advise the Wellcome team as we develop our campaign.
- **Wellcome policy team** who will be leading a Green Paper consultative process to produce Wellcome's policy positions and devise solutions that we can campaign for.
- **Wellcome public engagement team** who will be creating a global community of civil society organisation representatives that can speak to infectious disease in our target countries.
- **A creative agency** – following the completion of this research and the creative workshop, we will likely go through a similar competitive process for a contract to execute or implement the creative brief. If you choose not to apply for this brief or are unsuccessful in winning the potential contract for implementation, we would like you to conduct a handover and will reimburse you for any additional time that this takes.

The ways of working together are yet to be decided, but may include:

- Working together to refine campaign ideas and develop a creative brief, as part of a workshop you will run at the end of the project.
- Regular status update meetings throughout the project.

- Sharing insights across the teams to inform different elements of the campaign and build on each other's work.
- Sharing drafted documents for wider review and feedback, as and when needed.

*Wellcome definitions:*

**Research and development (R&D) ecosystem:** the entire pipeline and chain of events that take early research on infectious diseases all the way to products that are ready to be used appropriately by patients. It spans the 'traditional' R&D pipeline from investment to discovery research, clinical trials to registration and approval. It also spans steps after approval that support products being made available and accessible to countries, including manufacturing, regulatory approval, commercialisation and procurement.

**A more effective and equitable R&D ecosystem:** will produce accessible, available, appropriate and affordable tools and products (vaccines, diagnostics, therapeutics, etc) to reduce the risk and impact of infectious disease, before they escalate.

**Escalating infectious disease:** persistence of infectious diseases that cannot currently be controlled. This includes outbreaks of previously unknown infectious diseases in human populations, or known infectious diseases that are rapidly increasing in incidence, prevalence, or other measures of health burden, across geographies or populations.

**Campaign ideas:** early campaign themes and 'big ideas' that will engage our audiences, influence their thinking and inspire them to take action. Ideas can be expressed in a few sentences or paragraphs and/or images and we expect they will be rough at this stage. These ideas will be used to develop a creative brief for the campaign.

*Existing research*

We want the agencies to build on existing research commissioned by Wellcome. We will send the following reports to you once we have received your expression of interest:

1. **Research on campaigning trends** in infectious diseases and where Wellcome can have an impact. Interviews and surveys of campaigners found:
  - Momentum can be sustained by linking action on infectious diseases to wider government priorities
  - Infectious disease campaigns must go beyond problems to articulate the solution
  - Showcasing the positive benefits of action for individuals is an effective mechanism in infectious disease campaigning
  - Infectious disease campaigners can achieve more when working together
2. **Research into the perception of Wellcome** amongst their government, partner and policymaker audiences. This found:
  - Many assume countries, their governments and policy makers prioritise infectious diseases. The Covid global pandemic has focused minds and budgets in this area.
  - Wellcome is best known for its work on infectious diseases work and therefore has greatest authority and equity in this domain.

- Infectious diseases is the area where global ways of working, forums, data and policy exchange and harmonisation are most developed with an already established, organised and defined global scientific community.
- Scientific knowledge and best practice, in infectious diseases seems to be perceived as translatable from global to being applied locally.
- Infectious diseases is perceived as largely uncomplicated, uncontentious and uncontested scientific knowledge and method (common 'enemy' being the sceptics (e.g. anti-vaxers), whose claims seem to reinforce and embolden a united scientific agenda etc).

### 3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT	10 <sup>th</sup> February 2023
2	Submission of expression of interest to RFP and Supplier Q&A to Wellcome lead Contact	Supplier	16 <sup>th</sup> February 2023
3	Return of Supplier Q&A to Suppliers	WT	23 <sup>rd</sup> February 2023
4	Submission of RFP Response	Supplier	3 <sup>rd</sup> March 2023
5	RFP Evaluation Period	WT	6 <sup>th</sup> March to 9 <sup>th</sup> March 2023
6	Supplier Presentations	Supplier	13 <sup>th</sup> March to 15 <sup>th</sup> March 2023
7	Notification of Contract Award	WT	Late March 2023
8	Contract Negotiation	WT & Supplier	Late March to April 2023
9	Contract Start Date	WT & Supplier	End of April 2023
10	Final report delivered	Supplier	23 <sup>rd</sup> October 2023

#### 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 e-mail to [l.deverson@wellcome.org](mailto:l.deverson@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 on specific questions in relation to this RFP exercise.

#	Question
1	Outline your approach and provide details of the methodology and recruitment approach through which you will conduct the work. This outline should be inclusive of your research strategy and reflect how you will work with Wellcome to produce deliverables to a high standard.
2	Outline any amendments or additions to the work proposed in the RFP, including any (reasonable) proposed adjustments to timelines. A final timeline will be agreed prior to finalising the contract. There can be some flexibility, but this will be limited as we are working to a fixed timeline.
3	Include key milestones and deliverables aligning with the proposed timeline presented above.
4	Outline why you are best placed to deliver the work laid out in the RFP, which may include technical knowledge, relevant networks, previous experience, and other relevant information for the delivery of this proposed piece of work.
5	Outline what the anticipated deliverables, including interim deliverables, will be and in what format you'll present these findings.



6	Provide a cost proposal with a detailed breakdown of costs excluding VAT which details and justifies the proposed costs to meet our requirements. Seemingly costly aspects of your proposal will require further explanation.
7	Highlight any risks you may foresee with meeting our requirements and explain your approach to mitigating them.
8	Summarize any GDPR risks and how you will mitigate against them.
9	Outline your approach to diversity, equity, and inclusion in your proposed methodology and within your organisation.

Proposals will be assessed against the following criteria:

<b>Methodology</b> 30 %	<ul style="list-style-type: none"> <li>• <b>Coverage:</b> How well are the desired focus areas (as outlined in the specification) covered in the proposed methodology?</li> <li>• <b>Quality:</b> Is the proposed methodology aligned with our needs?</li> <li>• <b>Equity, diversity and inclusion:</b> Will the proposed methodology deliver on our commitment to fair and equitable practices?</li> <li>• <b>Utility:</b> Will the proposed methodology deliver the desired, credible, and useful results?</li> </ul>
<b>Experience</b> 30 %	<ul style="list-style-type: none"> <li>• <b>Skills and Experience:</b> Does the supplier have the relevant skills, experience, and contextual understanding to deliver this work?</li> </ul>
<b>Delivery &amp; Outputs</b> 25 %	<ul style="list-style-type: none"> <li>• <b>Communication:</b> Is there a good plan for communicating with the Wellcome team?</li> <li>• <b>Delivery plan:</b> Is the proposed delivery plan appropriate and achievable?</li> <li>• <b>Feasibility:</b> How feasible is the delivery plan? Are there significant risks associated with the proposed timelines, and how well are they mitigated?</li> </ul>
<b>Budget</b> 15 %	<ul style="list-style-type: none"> <li>• <b>Value for Money:</b> Is the proposed work within budget and good value for money?</li> </ul>

### 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 7 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 invited to Presentation stage will be asked to complete the [TPSRA2](#) assessment beforehand for Wellcome to assess how you handle data.

### Supplier Presentations

Following a submission of the proposal, successful proposals will be invited to a virtual meeting which will last 50 minutes in total. This will include a 20 minute presentation followed by questions and answers session.

## **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](http://wellcome.org).

## **6. 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.

## **7. 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.

## **8. 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.

## **9. Funding**

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

## **10. 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.

## **11. 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.

## **12. 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.

### **13. 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.

### **14. 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.

### **15. Wellcome Contact Details**

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

Name: Layla Deverson  
Role: Campaign Manager  
Telephone no.: +44 20 7611 2028  
Email: [l.deverson@wellcome.org](mailto:l.deverson@wellcome.org)