



Request for Proposal (RFP) for The Development of an Audience Segmentation

1. Background and Objectives

Wellcome is a global charitable foundation that supports science to address the urgent health challenges that the world faces. In 2021 Wellcome's launched a new strategy and for the next ten years we will fund 4 strategic programmes: Discovery Research (DR) and 3 of the biggest health challenges: Climate and Health (CH), Infectious Disease (ID) and Mental Health (MH). Our outcomes are global and therefore this means influencing and funding on a more global scale, ensuring that we are not solely focusing in global north spaces. Find out more about Wellcome and our work at: [wellcome.org](https://www.wellcome.org).

To achieve its strategic objectives, Wellcome needs to reach, engage, and influence audiences across the research community, research eco-system and wider health eco-system. However, the audience categories we use today – researchers and policy-makers - are too broad to be practically useful and include too many disparate sub-groups to enable tailored communications and engagement. A deeper understanding of the sub-groups we need to communicate and engage with most consistently will allow us to: develop and maintain relationships in a less transactional and more meaningful way, and target and 'activate' specific audiences with bespoke activities, for example to support funding calls or as part of a campaign.

To overcome this problem Wellcome is investing in a major project to define Wellcome's global audiences and understand who they are and how best to reach them. This project is being led by the Insight team, which sits within Corporate Affairs.

This is a foundational project that will inform all Wellcome's Corporate Affairs' activity for Wellcome's four strategic programmes and its brand programme.

In order to deliver this major project a 2-phase programme of work has been developed. The first phase has been completed and consisted of a rapid internal scoping exercise, which identified audiences and why they are important to Wellcome. The second phase is the subject of this RFP.

Phase 1 sought to mine internal knowledge and identify Wellcome's audiences, where are they and why are they relevant. The outputs included a preliminary long list of potential audiences, some detail on key organisations and broad direction for geographies and a sense of why we want to reach them. The outputs from Phase 1 will form a key input for Phase 2 and will primarily inform the Phase 2 sample. The full outputs of Phase 1 will be shared with the appointed supplier(s) however, please refer to attachment 1 which details audience subgroups across the 4 strategic programme areas.



Phase 2 Objectives:

- To deliver a meaningful segmentation of Wellcome's audiences, both those we effectively reach today and those we need to reach in the future.
- To ensure that the resulting audience segmentation can be practically applied by Corporate Affairs and others within Wellcome who need to reach, inform, engage, and influence audiences, in pursuit of its strategic programme and brand goals

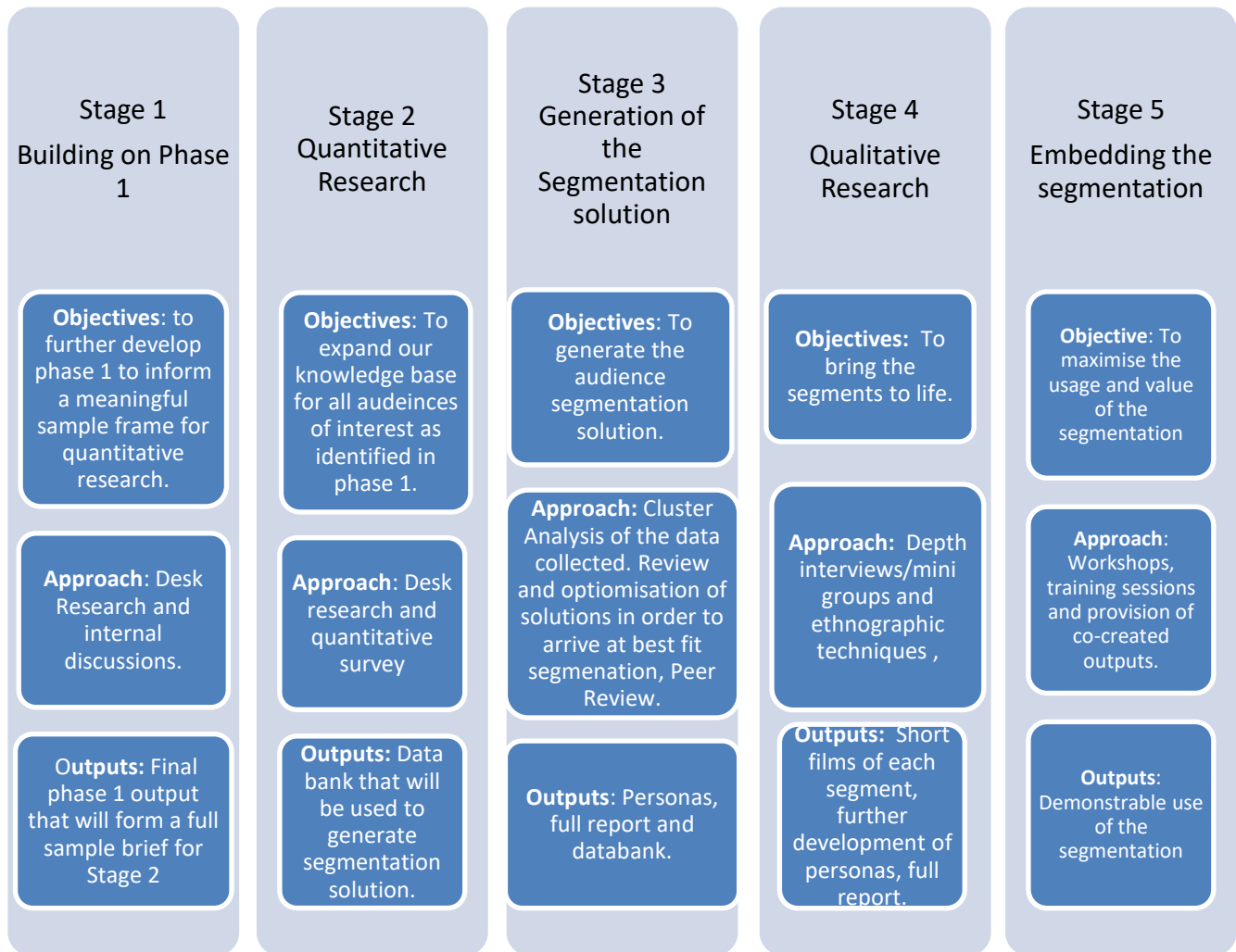
2. RFP Specification

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.

2.1 The Approach

The achievement of phase 2 objectives will require a programme of insight work that involves both quantitative and qualitative research methodologies in multiple geographies. The Wellcome Insight team have developed a 5-stage programme of work that they believe will be required to develop the segmentation, build understanding of those segments and ensure the segmentation is actionable across all communication and engagement activities, including the identification of segments within future insight projects e.g. campaign tracking research, strategic or creative development research. Fig 1 outlines the full programme of work and forms the main requirements of this RFP however, we are open to revisions to this programme, if accompanied with clear rationale as to why an alternative approach would more effectively deliver against the project objectives compared to the programme outlined.

Fig 1



Requirements in more detail

2.1.1 Stage 1 -Building on the internal work: The rapid internal exercise to identify audiences relevant to Wellcome’s Strategic programmes provides the initial building blocks for Phase 2, in particular a sample frame for primary research.

Through internal desk research and consultation with the 4 Strategic Research Programmes we identified the audiences that we need to reach and engage when delivering Corporate Affairs activity to support the Wellcome strategy. Audiences identified are based on job titles, areas of work related to the 4 research programmes, however, to enable the development of the sample for the quantitative research there are several gaps in knowledge to be filled and decisions to be made.

It is hoped that by the time a supplier(s) has(have) been commissioned, many of these questions will have been answered through internal consultation lead by Wellcome’s Planning and Insight team however, proposals should contain the option to support this work and include provision and costs for a combination of desk research and discussions with internal Wellcome stakeholders to answer the following questions:



- The identification of the countries which are important for diversification of Wellcome's work and thus where fieldwork will need to be undertaken.
- Any sub-groups that are missing from Phase 1 that are relevant to the work of Corporate Affairs
- Agreed definitions of sub-groups e.g working in health research / policy in the areas of infectious disease, mental health or climate and health and who have influence on policy.
- Identification of known criteria within sub-groups that would be important to take account of eg early career, mid-career, and established researchers.
- Identification of sub-groups that are most relevant to the work of Corporate Affairs.
- Phase 1 has mapped audiences into 3 sub-groups related to the eco-system – the research community, research eco-system and health eco-system. Are all these sub-groups of equal importance to the work of Corporate Affairs? Are there occasions when all 3 sub-groups are targeted together or is it more likely that one sub-group would be targeted?

For the purposes of proposals please assume desk research and conducting up to 4 workshop style sessions with Wellcome staff will be required.

2.1.2 Stage 2 - Quantitative Research

Quantitative research will form a key part of the Phase 2 approach. It is anticipated that quantitative research will be the first stage of research, followed by qualitative research however, we are open to the consideration of the reversal of these methods should a strong case be made by the selected supplier.

Consideration should also be given to piloting the questionnaire prior to full roll to test recruitment and questionnaire or conducting a small phase of qualitative research to inform recruitment, questionnaire etc.

The objective of the quantitative research will be to expand knowledge of audience groups identified in phase 1 surveying a representative sample of the audiences, this will provide the data that when analysed will deliver the audience segment solution. The audiences of interest are shown in Fig 2 below, with more detailed information of how these audiences sit across Wellcome's 4 strategic programmes available in Attachment 1. Audiences have been mapped across the journey according to their role in the systems we operate in, from the basic funding and undertaking of science and research, our influence in the wider research, health and society that facilitate the translation of research outcomes to those people who will benefit.

Please note that Fig 2 may not be the final list of audience groups to be included, there may be additional audience groups that emerge however, your proposal should be based on the audiences shown in Fig 2.



Audience subgroups by focus from research through uptake

Audience subgroup	DR	MH	ID	CH
Basic science	Blue	Blue	Blue	Blue
Biological and Psychological	Blue	Blue	Light Blue	Light Blue
Social science	Blue	Blue	Light Blue	Blue
Humanities	Blue	Blue	Light Blue	Blue
Data science	Blue	Blue	Blue	Blue
Lived Experience experts/Survivor Researchers	Light Blue	Blue	Light Blue	Light Blue
Funders/foundations	Blue	Blue	Light Blue	Blue
Regulators	Blue	Blue	Blue	Light Blue
Publishers	Blue	Blue	Light Blue	Light Blue
Pharma	Blue	Blue	Blue	Light Blue
Tech	Blue	Blue	Blue	Blue
Think tanks	Light Blue	Light Blue	Light Blue	Blue
Charities/NGOs	Light Blue	Blue	Light Blue	Light Blue
Multilaterals	Light Blue	Blue	Blue	Blue
National governments	Blue	Blue	Blue	Blue
Policymakers	Blue	Blue	Blue	Blue
Practitioners	Light Blue	?	Light Blue	Blue
Private sector	Light Blue	?	Light Blue	Blue
Financial institutions	Light Blue	Light Blue	Light Blue	Blue
Most affected communities/people with lived experience	Light Blue	Blue	Blue	Blue

Fig 2 – Wellcome’s Audiences

Whilst the main deliverable at stage 2 will be a quantitative survey, it is envisaged that desk research will need to be undertaken by the selected supplier(s) to ascertain the size of our audiences of interest. This additional information will be required to inform quotas for each audience group of interest.

Sample

It is envisaged that the findings from Stage 1 and the desk research at the beginning of Stage 2 will enable a sample frame for the quantitative research to be designed.

The total sample will combine members of the above audience groups known to Wellcome i.e those who Wellcome has funded, engaged, and influenced in the past or is currently doing so, those who have applied for funding but may not have been successful, and prospective audience members who we need to reach, engage and influence in order to achieve Wellcome’s strategic ambitions. Attachment 1 details types of researchers that we view as new opportunities, with new opportunities for other audiences mainly, but not exclusively determined by geography.

At the overall sample level, it is suggested that the sample splits 50:50 between current audience: opportunity audience to ensure the segmentation solution is based on a sample that equally reflects those audiences who work with or are familiar with Wellcome and those we would like to work and engage in the future. However, it is unlikely that this sample split will be consistent across audiences, strategic programmes, and countries.



Sample Recruitment

Existing Wellcome contact details will be provided to the selected supplier(s) in line with UK data protection legislation however, suitability of contacts for the sample may need to be assessed prior to them taking the survey. Please take this into account within proposals.

At the moment we do not have a full and accurate picture of contact details for all audiences but it is likely, that we will hold the largest number of contact details for research audiences. For example, we have over 8,000 contacts listed who have successfully applied for funding in the last 5 years and who are contactable for marketing purposes, however almost 80% of these are based in UK institutions, thus using other sources to reach and recruit outside of the UK will be required. We have a limited number of contacts for other audience groups however, we expect their universes to be much smaller.

In terms of finding sample, please recommend the techniques you would use to recruit the audience groups we are interested in but cannot provide contact details for.

At this stage we cannot determine the total sample size however, to ensure credible analysis it is recommended that the project aims to achieve a minimum of 50 respondents per audience group in the quantitative research. It is recognised that this will be dependent on the universe of those audiences groups which will be determined as part of the desk research.

Geography

Wellcome has global ambitions, and this project will need to deliver a segmentation solution that reflects those global ambitions.

The final country selection for this project is still being decided so for the purposes of this proposal please assume that countries where fieldwork will need to be undertaken includes UK, Germany, Belgium, U.S, South Africa, Kenya, India, Brazil and Malawi.

These countries may change to include other countries in the regions of Africa, Asia and Latin America. It is hoped to be able to provide a more comprehensive list of countries of interest at the time of the Q&A response. However, in the absence of that please ensure your proposal considers how you will effectively address recruitment and fieldwork in the regions highlighted with any restrictions on capability and capacity related to countries made clear.

Please note that there may be some differences in which countries are relevant to which audiences and/or the strategic programmes and this will need to be reflected in the sampling.

Questionnaire



The questionnaire will need to be developed in consultation with the Wellcome's internal project reference groups. This group will consist of users of the audience segmentation from across corporate affairs and research programmes. For illustrative purposes only questionnaire content may include the following:

- Demographics
- Nature of organisation/institution they work for/with
- Career stage/role within team/organisation
- Role in the eco-system
- Interest/involvement in the health challenge areas
- Interests beyond health eg Culture
- Attitudes and beliefs connected to health challenge areas
- Sources/channels of information
- Trusted Messengers
- Awareness and understanding of Wellcome
- Perceptions of Wellcome

It is expected that an on-line survey will be the main mode of data collection however, face to face and/or telephone survey alternative should also be considered to ensure that taking part is accessible to all who fall within the sample criteria. Other considerations to ensure compliance with Wellcome's inclusive principles include the potential need for translations of questionnaires, inclusion of marginalised communities within lived experience sample, mix of gender, age, inclusive of disability etc.

Please base costs on both a 10- and 15-minute questionnaire, allowing for 2 and 3 open-ended questions respectively.

2.1.3 Stage 3 - Generation of the segmentation solution

The generation of the segmentation solution will require advanced statistical analysis of the data collected in the quantitative research, with experience of applying techniques such as cluster analysis to large data sets.

It is anticipated that there will need to be several iterations, review, and revisions of possible segmentation solutions before the optimum solution is arrived at. The Wellcome project team and internal project reference groups will be involved in reviewing the iterations and the supplier should anticipate 3 meeting/workshops before arriving at final segmentation, including presentation of the recommended solution to Wellcome's Planning and Strategy Committee.

We would welcome consideration of the advantages/disadvantages of involving an external expert peer reviewer at stage 3 to ensure the segmentation that is arrived at is derived from solid data and analysis and is fit for purpose. If you would recommend this, then please include details of a suitable peer reviewer, if not please give reasons.

In addition to the segmentation solution the key required output from this stage will be a set of questions and/or criteria by which the segments can be identified and recruited in future research projects.



It is anticipated that the main outputs from this stage will be accompanied with a full report (including stage 2) and presentation, including portraits of each segment, their profile, attitudes, nature of relationship with Wellcome, preferred channels and forms of communication and other knowledge that has been derived from the survey in Stage 2.

2.1.4 Stage 4 - Qualitative Research

The objectives of the qualitative phase of work are to refine the segments, bringing each of the segments to life and to develop recommendations on how Wellcome can most effectively reach and engage each segment.

The qualitative research will build a detailed picture of each segment, by adding richness and depth to the quantitative findings. It is anticipated that this picture will include a much deeper understanding of their contexts, cultures, interests and beliefs, awareness and understanding of Wellcome, information sources and needs.

At this stage we are open to ideas on how best to achieve such detailed pictures and understanding of audience segments. Methodologies could include depth interviews/groups and ethnographic techniques. We envisage the sample coming from re-recruitment of a selection of those who took part in the quantitative research.

Until stage 2 and 3 has been completed it will not be possible to design the qualitative phase, however, please demonstrate in your proposals experience, capability and capacity to conduct qualitative research to build understanding of audience segments.

2.1.5 Embedding the segmentation

The creation of segmentation outputs that are informative, engaging and most importantly usable for all relevant internal stakeholders will be a requirement across the phase 2 programme of work and is a distinct requirement of this work programme.

Possible formats for outputs and actionable tools could include videos to bring segments to life, searchable knowledge bank of information related to segments that can be used by communication practitioners, “set of golden questions/essential questions” that allow identification and recruitment of segments to future qualitative and quantitative research projects, in addition to the formal research reporting that documents approach and findings.

A programme of socialisation of the final segmentation and outputs will be developed in partnership with the appointed supplier(s) and in consultation with internal stakeholders.

2.2 Timings

Fig 3 provides detail of the key milestones focusing on key delivery dates for each stage. In proposals please clearly state any dependencies/assumptions that have been made in achieving the timing requirements.



Fig 3 – Project key timings

Stage	Estimate completion date
Procurement process finalised and supplier(s) selected	Early/Mid May
Finalising Contract (timing based on procurement estimates)	Early June
Stage 1 – building on Phase 1 findings (need for this stage is dependent on progress made by Wellcome prior to commission)	End Of June
Stage 2 – Quantitative Research (+ desk research)	End of September
Stage 3 - Segmentation Solution	End of October
Stage 4 - Qualitative Research	End of February 2024
Stage 5 – Embedding the Segmentation	From October to April 2024

2.3 Use of Incentives

It is envisaged that incentives will be needed to encourage participation and completion in this research, please include advice on the nature of incentives and whether you would recommend for both the quantitative and qualitative research.

2.4 Key Deliverables

Overall, the set of deliverables for this programme of work need to be engaging and practical as well as provide a comprehensive record of the full programme of work. All reporting and tools need to link together, with one consistent look and feel, resulting in a detailed yet engaging set of reports and tools that serve as a comprehensive record of methodology and findings of the project alongside engaging and actionable content and tools

Fig 4 outlines the key deliverables for each stage however, we are open to alternative formats for deliverables.

Fig 4 –Deliverables

Stage	Deliverables
Stage 1 (if required) + Stage 2 desk research	PPT reporting combining stage 1 and desk research in stage 2. This should include approaches, detailed universes of each audience sub-group, highlighting any limitations in findings, include desk sources and a clear recommendation on the sample frame for stage 2.



Stage 2	Quantitative Research	Clean dataset for analytical purposes at Stage 3
Stage 3	Generation of Segmentation Solution	<p>a) Full PPT report including sample, methodology (stage 2 and 3) , final questionnaire and resulting segments.</p> <p>b) Personas of each segment</p> <p>c) Full searchable data set usable by Corporate Affairs team and others who need to reach the segments.</p> <p>d) Provision of “golden questions” or alternative tool for identifying segments moving forward.</p>
Stage 4	Qualitative Research	a) full PPT detailed report including details of sample, methodology, discussion guides, findings by segment, mapping of segments in relation to Wellcome’s strategic objectives
Stage 5	Embedding the segmentation	<p>a) short videos bringing segments to life for stakeholders</p> <p>b) refinement of “golden questions” or tools for effective recruitment of segments to future insight projects.</p> <p>c) Co-creation of other assets for successful embedding of segmentation across all users within Wellcome.</p>

2.5 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. 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.

Wellcome are committed to ensuring diversity and inclusion is a part of everything we do, and we are committed to working with suppliers who align with our principles both in their own organisations but also in the work they deliver for us.

- Please consider at all stages of this project how you will apply principles of diversity, inclusion and anti-racism. Accounting for Wellcome’s diversity and Anti-racism principles, outline how this is reflected in your proposal. Please share information on your team’s diversity, the extent of your collaboration with in-country partners, your global presence, if you have a formal EDI strategy and how you demonstrate a



commitment to diversity and inclusion both internally and in your ways of working and research practice.

- Provide an overview of any knowledge and experience of contexts and settings especially in countries located in Africa, Asia and Latin America

2.6 Project Team

2.6.1 The Wellcome Team

The appointed supplier(s) will be working directly with a project team of 4 people, who are responsible for the successful delivery of this project. The team consist of insight, strategy and brand specialisms from across Wellcome. This team will be your main day to day contacts and is led by Tina Trythall, Senior Insight Advisor. The team is accountable to Associate Director of Planning and Insight, Philippa Michael.

We are also in the process of setting up a Corporate Affairs audience strategy reference group which will consist of users of the segmentation from our Corporate Affairs department (and possibly others from across Wellcome who communicate and engage with audiences). The main purpose is to ensure that users of the segmentation can help shape, consult, co-create, and test the segmentation as it developed ensuring that the resulting solution and outputs are fit for purpose. Finally, at key moments throughout the programme of work we will provide updates and consult with representatives from Research Programmes, Strategy, Culture, Equity & Diversity team to ensure continued support and engagement.

2.6.2 Your Team

Given the complex nature of this project it is recognised that more than one supplier may need to be involved in the successful delivery of this programme of work and we are therefore open to proposals submitted from a consortium of suppliers. However, we would require one lead supplier to be responsible for managing the project including co-ordination of all work conducted by partners, outputs developed as part of this project and liaison with the Wellcome project team. We would of course be open to dialogue and meetings with any partners as necessary but need these to be part of a fully co-ordinated and managed approach.

In terms of managing the project please allow for a weekly on-line status meeting with the main project team accompanied by a 1-page status update identifying progress and outlining challenges and concerns. At times of key decisions, additional meetings may well be required alongside attendance at internal Wellcome reference group meetings as required.



2.7 Required Experience

This is a complex mixed method, international project with audiences that are less typically involved in research and as such we are looking for proposal to demonstrate the following:

- Previous experience of developing audience segmentations, ideally with non-public/consumer audiences
- Experience in both quantitative and qualitative research methodologies, as well as statistical analysis.
- Demonstrable experience of conducting quantitative and/or qualitative research with some or, all the audiences that will be included within this programme of work
- Demonstrable examples of developing creative insight outputs and tools that have enabled clients to embed research findings and in particular segmentations within their organisations and strategies.
- Demonstrable experience of managing complex, multi-stage projects.
- Experience of conducting international research including in Africa, Latin America and Asia.

2.8 Budget

Wellcome will be guided by the supplier as to what is a reasonable budget for this activity as we do not want to limit ambition or innovation.

3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers and live on website	WT	13 th Mar 2023
2	Submission of expression of interest to RFP and Q&A from Suppliers should be sent to the Wellcome Contact	Supplier	24 th Mar 2023
3	Return of Supplier Q&A to Suppliers	WT	31 st March 2023
4	Submission of Full proposal to the RFP	Supplier	14 th April 2023
5	RFP Evaluation Period (successful suppliers will be invited to Presentation stage)	WT	w/c 17 th – 26 th April 2023
6	Supplier Presentations	WT & short-listed suppliers	3/4 th May 2023
7	Notification of Contract Award	WT	w/c 8 th May 2023
8	Contract Negotiation	WT & Supplier	May 2023



9	Contract Start Date	WT & Supplier	End of May/early June 2023
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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 the Wellcome Contact 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 short summary of suitability to successfully deliver this project
- 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

Your proposal should contain the following broad sections and ensure that all answers to all questions listed in the table below are included in your response

The broad sections are:

- Your understanding of project objectives and purpose
- Recommended approaches and methodology for each stage of the project
 - Detailed timing plan for each stage
 - Detailed costing plan for each stage
 - Use of incentives
 - Deliverables at each stage
 - Any assumptions made
- Details of any third-party suppliers or collaborators
- Details of the project team including a clear outline of responsibilities of each team member.



- Relevant Experience (including 2 case studies that best demonstrate that experience)
- Diversity and Inclusion.
- Risk register

RFP Questions

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

#	Question	Max Words/Pages
1	Please provide your understanding of the project objectives and purpose	1 page
2	Describe in full detail how you would meet stage 2, 3 and 4 of the programme of work including samples, recruitment of sample, methodologies, incentives, deliverables and clearly highlighting any dependencies.	8 pages
3	Describe how you would ensure successful delivery of stage 5 – embedding the segmentation including outputs and tools, using examples of relevant outputs you have developed.	1 page
4	Please provide an outline timing plan for each of the above stages, considering the key delivery dates as detailed in section 2.2.	1 page
5	Make us aware if you envisage using any third parties for the delivery of any aspect of Wellcome’s requirements?	As relevant
6	Provide full details of the main project team with responsibility for delivering this programme of work (including biographies) and any key person in third party partners who would be involved.	½ pages per person
7	Provide demonstratable experience as detailed in section 2.5 and include 2 case studies that best demonstrate experience	2 pages
8	Please consider Wellcome’s Diversity and Inclusion principles and Anti-racism principles, and outline how this is reflected in your proposal.	1 page
8	Highlight to us any risks which you foresee with meeting Wellcome’s requirements and suggested mitigations	1 page
9	Describe the value- add services (outside of the services requested within this request) including limitations, offered by your organisation from which Wellcome may benefit from	½ page
10	Provide your cost proposal based upon the requirements set out within this procurement exercise setting out: <ul style="list-style-type: none"> • A detailed breakdown of costs for each stage 2 and 3 and an overall total cost of each stage. • Clearly state any assumptions made in arriving at those costs 	1 page

	<ul style="list-style-type: none"> • Please provide a rate card for additional costs associated with increases in sample size or additional countries at stage 2. • Please provide a rate card for Stage 4 including elements such as cost per interview, per group, ethnographic session as applicable to your recommended methodology. • Costs associated with your recommendations at Stage 5 • Have you provided any discount to your standard charging model? If so please describe. 	
11	Please detail any International Standards your company conform to that are relevant to the delivery or management of the service e.g. ISO 20252	½ page

Evaluation of Proposals

Proposals will be assessed against the following criteria:

Criteria	Coverage	Weighting
Understanding of the objectives and requirements	Fully understands the business problem and the objectives of this project and how a segmentation can most effectively overcome that problem.	10%
Methodology	<p>Will the proposed methodology deliver against the project objectives? Is there an effective approach to sampling, including recruitment? ?</p> <p>Will the proposed approach effectively deliver to the phase 2 objectives and within the desired timescales? Does the proposed approach fully take into account principles of diversity, inclusivity and anti-racism? The proposal has identified effective risk mitigation and how to overcome challenges</p>	50%
Deliverables	<p>Will the proposed reporting and tools at each stage deliver an audience segmentation that is actionable? Do the proposed deliverables demonstrate the ability to deliver audience insight in engaging and relevant ways for those who will use it?</p>	10%



Delivery	Is there a dedicated project team at all levels, Is there a good project management plan including communicating with the Wellcome team? Is the proposed delivery plan appropriate and achievable?	10%
Experience	Skills and Experience: Does the supplier(s) including any third party suppliers and the project team have the relevant skills, experience, capacity and contextual understanding to deliver this work? Demonstrates a diverse and inclusive team and experience	10%
Budget	Is the proposed work within budget and good value for money?	10%

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).

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 when they are invited to presentation stage, this is 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 and will be a PowerPoint presentation followed by questions and answers session.



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 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/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. Wellcome Contact Details

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

Name: Tina Trythall
Role: Senior Insight Advisor
Email: t.trythall@wellcome.org