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**wellcome**

# Request for Proposal (RFP) for a Branding Agency

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# Introduction

## Background to this brief

Wellcome's brand team are looking to partner with a Lead Agency who can help us develop our Brand and shape how it looks, sounds and feels. We are not looking to rebrand, but to build bigger and better ways to express ourselves in visual and verbal ways, and to become an anti-racist and anti-ableist brand. This specific brief is focused on our tone of voice and visual style, but we are hoping to establish a long-term relationship with the right agency to partner with us to solve future brand challenges together.

## About Wellcome

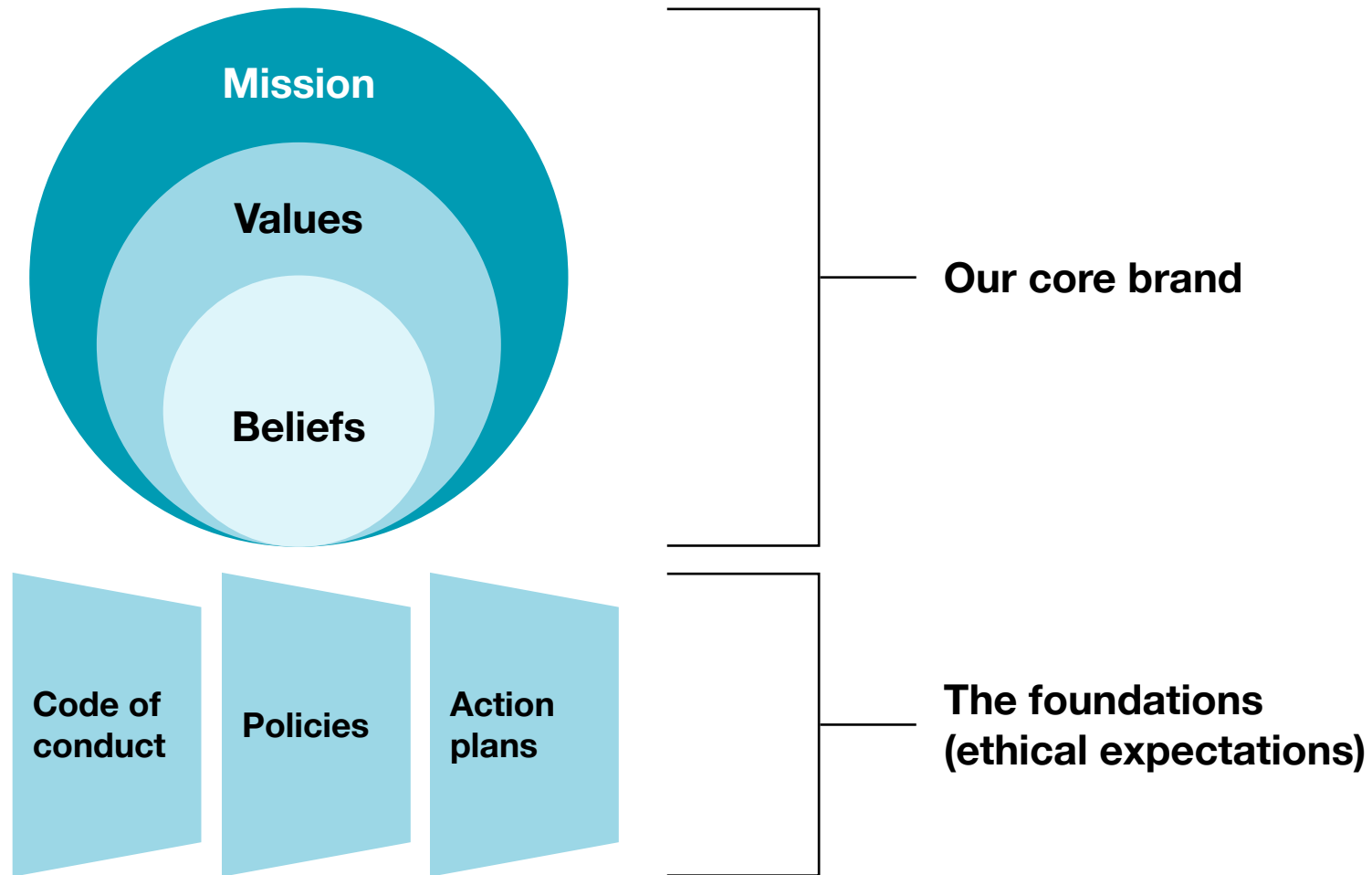
Wellcome is a politically and financially independent global charitable foundation. We support discovery research into life, health and wellbeing, and are taking on three worldwide health challenges: mental health, climate and health, and infectious diseases. Wellcome Collection is our free museum and library in London exploring health and human experience.

In October 2020 we set out our [strategy](#) and mission to 'support science to solve the urgent health challenges facing everyone'. We plan to spend £16 billion over ten years on this strategy. This explicitly places science and health at the heart of everything we do and concluded that Wellcome-funded science should enable science and innovation to tackle the greatest threats facing humanity. Wellcome has developed 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.

Wellcome has no living founder, no shareholders, donors or political allegiances. We have inherited a privilege and we are determined to use this wisely.

# Our Brand

We define the Wellcome brand as shown:



# Our Brand

We have very recently developed our beliefs and values.

## Beliefs

Our beliefs are short statements which clearly articulate our philosophy, motivations and purpose. They are at the very centre of our brand and provide the golden thread for everything we do, so that our efforts align as one.

- We believe in the power of science to create knowledge that builds a healthier future for everyone.
- We believe science has its greatest benefits through collaborative action across society.
- We believe diversity of people and expertise leads to richer understanding and more impactful discoveries.
- We believe everyone's experience of health matters, and everyone should be able to benefit from science.
- We believe we should take on risks and tough challenges – especially when others aren't.

## Values

**Our Values** define how we work. They have come from us thinking about the type of organisation we want and need to be, in order to deliver our mission. These are aspirational values that we intend to embed in all we do internally and externally in the coming years. We want our values to guide our culture, behaviour, ways of working and of course our tone of voice.

Wellcome will need to consider how we can more strongly live these new values and build them into what we do. For example, as part of the “inclusive” value, we want Wellcome to become an anti-racist and anti-ableist brand.

- **Transformative** – we always strive to make a significant difference
- **Thoughtful** – we consider the consequences of our actions and our impact on others
- **Inclusive** – we respect all people and perspectives
- **Brave** – we stand by our beliefs and push boundaries

Our values are a set and need to be considered together. We may at times need to consider the tensions between them. While we may need to dial up and down specific values as relevant, we would never want to compromise on any of our values.

Our new beliefs and values will begin to be rolled out internally from October 2023. We will begin using them in our external communications from 2024, once we feel comfortable enough with them internally and once we have clarity on our new tone of voice.

Our new values will replace our existing principles – the closest thing we had to values before.

# Welcome's current visual and verbal brand

Wellcome's current visual Brand, developed in 2016, consists of a basic graphic system that includes a broad colour palette, bespoke typeface and a guided approach to imagery. This is used by Wellcome's in-house creative team and commissioned creative suppliers to deliver many different aspects of our visual communications, from design-led projects to self-service templates. Wellcome's current visual brand has a limited scope of elements. It does not offer enough to deliver appropriate on-brand solutions across all channels.

Wellcome's Tone of Voice, style guide and writing guidelines were developed in 2019, intended to be used for all of our external communication, across press, website and direct to our stakeholders. If these are not updated, they risk confusing and diluting the impact and efficacy of our beliefs and values.

Wellcome's current tone of voice principles (*Compelling, Inclusive and Can-do*) are not closely connected with our principles (*we make it count, we act boldly, we stretch ourselves, we pull together*). We hope to rectify this going forward so that our tone of voice flows logically from our new values.

It is vital that our visual and verbal tools work together and complement each other so that we have a consistent Brand approach.

Wellcome Collection is a core part of the Wellcome brand, but has a different logo and brand toolkit. Wellcome Collection will embody our collective values and beliefs in its tone of voice but will keep its current visual brand for the time being.

It is important to note that we're not looking to rebrand. We believe our current Wellcome Brand has strong and established foundations on which to build bigger and better creative expression that can convey our values, and eventually our brand story.

We are building an anti-racist and anti-ablest brand: in our tools, our processes and our outlook. Wellcome's mission is to "support science to solve the urgent health challenges facing everyone" which means equity, diversity and inclusion are fundamental to us. We believe our brand is a powerful tool to drive change and we want to partner with organisations who share our commitment.

<https://brand.wellcome.org/>

# Core audiences

Wellcome has many different audiences and stakeholders. However, there are some priority audiences to consider for our communication and therefore for this brief. It is important that our new brand approach can span the diversity of our audiences:

- i. **General audience**  
We often develop general communication to reach a breadth of our audiences, on our website for example.
- ii. **Researchers and practitioners** in academia, industry and beyond, who actively work on one of the health challenges or discovery research, including those outside the life-science field, such as data scientists, climate scientists, social scientists.
- iii. **Policy makers and influencers** who actively work in areas relating to the health challenges or discovery research (in science and beyond) or in an organisation with a complementary mission, such as a B Corp, government, multilateral department, or public sector body.
- iv. **Wellcome Collection visitor**  
The majority of visitors to Wellcome Collection are museum-going members of the public who are interested in our exhibitions, library, live events, café and shop as well as our online offer via [wellcomecollection.org](https://wellcomecollection.org). We have a strong profile with younger audiences (under 35 years) and ambitions to engage with more diverse audiences as part of our new strategy.
- v. **Investments**  
Wellcome funds its own work through our £38 billion investment portfolio. We manage our investments in-house, engaging directly with a wide range of companies and fund managers. We have issued long-term bonds, and regularly update bondholders about our finances and our charitable work.

Our audiences vary – and in some cases their needs conflict. For example, researchers and practitioners are more likely to expect more technical scientific language, while other audiences will need more accessible language. For our ‘open’ channels (such as our website and social media) we will prioritise accessibility, catering to an average reading age.

We have prepared samples of [written](#) and [visual](#) communications to help demonstrate how the communications vary per audience.

# The Brief

To deliver a refreshed and expanded visual and verbal Brand Tools for Wellcome that translate our values into guidelines to help us communicate.

## Objectives

### To create:

1. A new vision for our verbal brand.
2. A new vision for our visual brand.
3. Tone of voice guidelines, to be used by all those who communicates on behalf of Wellcome
4. Updated visual brand guidelines to be used by our designers and creative suppliers.

These need to be developed in co-creation with teams across Corporate Affairs (Media, Digital & Content, Stakeholder Comms and Brand). The appointed agency would collaborate closely with our Senior Writer, Brand Designer and Creative Lead.

### The successful appointed agency will:

- A.** Refine vision for verbal and visual brand, following any feedback from Wellcome
- B.** Develop our tone of voice guidelines, including:
  - i. Give clarity on how to navigate the tensions around the different language styles and tones required by different audiences. We will need support to engage and influence different senior stakeholders around Wellcome, with opposing views on this.  
  
For example, academic styles commonly found in research, versus styles which prioritise more accessible language for the public, those unfamiliar with science, or those reading in a second language.
  - ii. The guidelines themselves, which will be updated on our Brand Hub
  - iii. Ideas and support with how to embed our new tone of voice and guide staff to use them in everything they say and do.

- C.** Update priority pieces of copy
  - i. Develop fresh “about Wellcome” copy.
  - ii. Apply our new tone of voice guidelines to some of the most important pieces of content, to help ensure we begin applying it correctly, including boiler plates, detailed beliefs content, and other content across major touch points and channels such as social media, web pages, exhibitions, and so on.
  - iii. Potentially develop a strapline for Wellcome.
- D.** Develop of our visual brand guidelines, including:
  - i. The guidelines themselves, to be updated on our Brand Hub
  - ii. Film and Photography brand guidelines  
Imagery is a foundational tool in telling the story of how we support science. With our new beliefs and values in place, what should we consider when commissioning or shooting new film and photography for Wellcome?
  - iii. Graphic elements: We use our bespoke font and signature 'W' to give us graphical devices to shape our visual style. But our communications need more. What does the lens of our new values, beliefs tell us about our personality?
  - iv. Animation and illustration: We use illustration to help us depict more thematic concepts and difficult-to-visualise topics for which photography might not work. Or when developing infographics to depict health issues and data stories. How can this be functional and follow digital best practise but also build our brand recognition and style?



# How to respond to this request

## Supplier Q&A

Prior to the submission of your expression of interest (EOI), Suppliers can submit any questions they have about the brief and project. All questions will be collated, anonymised, answered and returned to all Suppliers. 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.

## Expression of Interest

Suppliers are asked to submit a short expression of interest (EOI) by email to the Wellcome contact (Marina da Silva) in accordance with the RFP timetable below sharing the following information:

- Whether you are a company or individual. If a company please provide: full company name, address, and company registration number.
- An overview of your organisation including any differentiators (as they relate to Wellcome, its sector and the services we are seeking).
- Two case studies of where you have successfully provided services similar to those described in this request for proposal.
- What you do to drive diversity and inclusion in your organisation. Include indicators of progress if you have them.
- What you would consider to make you the right supplier for this project.

## Shortlisted Suppliers

Based on the EOI, we then select a maximum of four suppliers to continue to the next stage. We will inform all those who submit an EOI of the outcome.

Shortlisted Suppliers will be asked to develop a short pitch proposal to show us the following:

### A. Your ideas for objective 1

- your vision for our verbal brand
- illustration of your vision brought to life in the sample copy given for our five audience groups. Please note: we do not expect you to rewrite everything – just a small sample to illustrate how your vision would be flexible for the different audiences

### B. Your ideas for objective 2

- your vision for our visual brand.
- this does not need to be highly developed. We just need to be able to understand your proof of concept
- We would also like to understand how the vision of your verbal and visual brand may be linked

**C. The approach you would follow for objectives 3 and 4 if appointed, with required budget and timescale.** We are a charity and 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.

### Pitches will be assessed against the following criteria:

- Understanding of and response to the brief.
- Skills and experience to meet the brief.
- Commitment to EDI.

# How to respond to this request

## Timetable

#	Activity	Responsibility	Date
1	Supplier questions to the Wellcome Contact	Supplier	12.06.23
2	Return of Supplier Q&A to Suppliers	Wellcome	16.06.23
3	Submission of: A) Expression of Interest to RFP	Supplier	26.06.23
4	Notification of suppliers <ul style="list-style-type: none"><li>• unsuccessful at shortlisting</li><li>• successful at shortlisting stage (max 4)</li></ul>	Wellcome	30.06.23
5	Supplier Pitch Presentations and submission of: A) TPSRA2 Form B) Confirmation from supplier that they are happy for their presentation to be recorded by Wellcome	Supplier	w/c 17.07.23
7	Notification of Contract Award	WT	24.07.23
8	Contract Negotiation and co-creation methodology agreement	WT & Supplier	24.07–04.08
9	Agency research and delivery	WT & Supplier	Aug–Dec Detailed timeline to be confirmed with supplier

# How to respond to this request

## i. Contract Feedback

This section shows how Suppliers can 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).

## ii. Supplier presentations

Supplier presentation meetings will be one hour in length, with a maximum of forty 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.

## iii. 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.

# How to respond to this request

## 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.

## Prospective Suppliers Personnel – IR35 and Off Payroll Working Rules

Before the RFP response deadline, Prospective Suppliers must make the Wellcome Contact (Marina da Silva) 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.

## 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.

## How we want to work with Suppliers

We would like to receive proposals from any type of supplier that is able to meet the brief, including freelancers, agencies or companies. If a supplier specialises in providing one or some of the services we are looking for, they could partner with other agencies or freelancers to provide the full list of services we're looking for.

## Funding

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

## 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.

## 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.

## 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. 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. More information about this can be found on the government website.

# How to respond to this request

## 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.

To model this in our communications, we worked with experts in equity and inclusion to develop Wellcome our '7 Inclusive Communications Principles'. A summary of the principles is as follows, but we will share the full guidelines with you by email. Please note that these are iterative.

1. We put accessibility, equity and diversity at the heart of every brief
2. We allow time and budget for meaningful inclusion at every stage
3. We make accessibility a necessity and a priority
4. We invite, involve and embed lived experience through our communications
5. We use inclusive language
6. We amplify minoritized voices
7. We are never neutral in the face of injustice that stands in the way of our mission

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.

## 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.

## Wellcome Contact Details

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

Name: Gale Foster (she/her)  
Role: Creative Lead  
Email: [G.Foster@wellcome.org](mailto:G.Foster@wellcome.org)  
Cc: [creative@wellcome.org](mailto:creative@wellcome.org)

# Attachments

- A. Our current [brand guidelines](#)
- B. Our current [tone of voice](#) guidelines
- C. Our [current principles](#)
- D. Example [design work](#) (showing simple vs complex use of graphics, use of W, use of photography, use of icons, etc)
- E. Example copy for our [five audiences](#)

**Wellcome supports science to solve the urgent health challenges facing everyone. We 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.**

**Wellcome Trust, 215 Euston Road, London NW1 2BE, United Kingdom  
T +44 (0)20 7611 8888, E [contact@wellcome.org](mailto:contact@wellcome.org), [wellcome.org](https://www.wellcome.org)**

The Wellcome Trust is a charity registered in England and Wales, no. 210183.  
Its sole trustee is The Wellcome Trust Limited, a company registered in England and Wales, no. 2711000  
(whose registered office is at 215 Euston Road, London NW1 2BE, UK). DE-7518/06-23/RK