

## BRIEFING DOCUMENT

**Climate and Health Audience Insight Programme: Inviting proposals for a supplier to deliver a workshop(s) on insight-informed advocacy, influencing and engagement in the field of climate and health**

### Objective and outcome

#### Overarching objective of this work:

- To deliver a workshop or series of workshop sessions that enables Wellcome's internal staff working on influencing and engagement (IE) programmes to better use audience insights on climate and health (C&H).
- Internal staff from across different teams\* will receive a hands-on experience on how to engage with climate and health audience insights\*\* to design insight-informed strategy or deliver insight-guided IE programmes.

\*The teams can include, but are not limited to, campaigns, policy, government relations, media, and community engagement.

\*\*Insights can include public perceptions, narrative or message testing, political frames, or segmentation for instance.

#### Outcomes:

- IE teams understand the value of insights and know how to effectively use them, so that they can design and execute strategic programmes that can be even more effective and successful.
- IE teams can harness audience insights within the climate and health field to advocate more effectively amongst key audiences and stakeholders, including politicians, policymakers, media, international organisations, among others.

Please see the brief specification section below for greater detail.

### Context and background

[Wellcome](#) is a politically and financially independent global charitable foundation. It supports science to solve the urgent health challenges facing everyone. Wellcome supports Discovery Research into life, health and wellbeing, and is taking on three worldwide health challenges: Mental Health, [Climate and Health](#), and Infectious Diseases.

The vision of Wellcome's Climate and Health (C&H) area is a world where catastrophic climate breakdown is averted in a way that allows human health to flourish. To support this, Wellcome funds bold and ambitious research augmented by an influencing and engagement (IE) portfolio that delivers strategic programmes on insight, policy, community engagement, strategic partnerships, and campaigns, among others.

Within this IE portfolio, our C&H Audience Insight Programme serves as a foundational major initiative aimed at significantly advancing our understanding of where, when, and why climate and health arguments land well, and how these can propel and drive climate action amongst key stakeholders and audiences particularly in the policy, political, practice, and private sector. The C&H Audience Insight Programme is a key enabler of Wellcome's IE portfolio, increasing the effectiveness of our communications, campaigns, policy, and strategy.

This brief emerges from Wellcome's Insight Team (Corporate Affairs) which is dedicated to building Wellcome's understanding of its key audiences and stakeholders. The Insight Team leads strategic global audience insight programmes and commissions research into our audiences and stakeholders in order to build strong foundations for the effective delivery of Wellcome's mission through its various teams.

### **Current challenges/problem space**

Audience insights are foundational to Wellcome's work. There are a few key challenges we have identified in terms of using and harnessing existing audience insight, particularly in the C&H field, published outside of Wellcome:

- Insight research can often be hard to access and apply: Audience insights can be esoteric in nature and complex to unpack and apply, especially in time-intensive settings. They may be presented in lengthy or inaccessible formats often accompanied by big datasets or complex methodologies and can be harder to use without any clear directions or actionable recommendations.
- The audience insight literature available on climate change and on health as independent fields can be quite expansive and the process of merging insight pieces to determine strategic directions can be complicated.

Inaccessibility of insight or difficult-to-use insight research can carry a risk of our IE work not being as effective. Wellcome's C&H Audience Insight Programme is currently in its early stages, building out and shaping up to design and deliver climate and health audience insight. As we seek out and respond to research gaps within the C&H insight

area, we want to be able to harness the knowledge base and insights already available on climate change, health, and related fields to guide our ongoing IE efforts.

To address these challenges and enable our teams' work to be informed by available external audience insight, we are looking for a supplier to deliver a workshop or series of workshop sessions on how to effectively find, understand, and use existing audience insights to inform, strategically design, and deliver IE portfolios within Wellcome. These IE approaches include policy work, campaigns, communications, advocacy, and engagement, among others. By being insight-led, we can deliver even more effectively in a contextually astute and audience-aware manner.

### **Brief specification**

#### **Deliver a workshop or series of workshop sessions that:**

1. Demystifies and eases the use of audience insights within the climate, health, climate and health, or related fields to inform strategic programmes of IE work. This IE work includes but is not limited to communications, campaigns, policy work, partnerships, and engagement.
2. Uses examples of existing audience insight across climate, health, climate and health, or related fields as its focus. Audiences could include policymakers, the public, and health professionals, for instance. Examples of audience insights could include perceptions, attitudes, segmentations, surveys, and message or narrative testing.
3. Offers a short guide that can facilitate the attendees ongoing and future work on IE, beyond the workshop(s). This short guide could be in the form of a toolkit, a set of pamphlets, general principles, or an alternative form proposed by the supplier.
4. Engages attendees, especially through a practical or hands-on format and immersive delivery to inspire practice of regular use and engagement with audience insight. We would like a short evaluation component for the workshop.
5. Keeps Wellcome's [equity, diversity, and inclusion](#) values in mind and is accessible to all. We are keen to see proposals that embed values of inclusivity and equity in workshop design and facilitation and are guided by anti-racism, anti-ableism, and related principles.

We expect the supplier to have experience within the fields of climate change, health, and/or climate and health or to onboard relevant experts to draw upon best examples of latest and relevant literature/audience insights to inform the workshop(s) and materials.

#### **Notes:**

- We are open to propositions of a single or multi-part workshop.

- We are seeking proposals that focus on audience insight and perception/engagement research relating to C&H and not other types of scientific research.
- Language requirements – English
- Target audience – Internal Wellcome staff mainly working on C&H IE activities.
- Expected audience – Between 20-30 people.
- Format – In-person/hybrid or virtual. Wellcome are able to host the workshop on-site.

**Additional considerations:**

1. We would highly advise engagement with the Wellcome Project Lead throughout the project to further understand Wellcome’s C&H strategy, influencing and engagement work, and its strategic goals. This engagement could be through in-person meetings, virtual meetings, or e-mail during the designing of the workshop(s).
2. We would like the supplier to have relevant experience in the domains of audience insight, strategic communications, or related areas including working on insight-informed advocacy, engagement, strategy, or communications.
3. We expect the examples or case studies of audience insights used in this workshop to be from the climate, health, or climate and health fields. This will allow us to best utilise and learn from existing insights and get a hands-on sense of developing audience insight-led IE strategy, activities, or approaches such as messaging, policy lines, communication strategies, and tactics.

**Outputs**

- Lead on the workshop design with input from Wellcome.
- Workshop or series of workshop sessions.
- Background research or preparatory work to inform the workshop(s) plan and delivery.
- Workshop materials (handouts, exercises, PowerPoints, A/V tools, special software or technologies, any other immersive materials).
- Short written guides for workshop attendees to facilitate their ongoing and future IE work.
- Success metrics and evaluation of workshop, for instance based on attendee engagement and feedback.
- A workshop summary to be produced, along with relevant resources, which summarises key discussions, learning points, decisions, action points and future recommendations.

*Note:*

- We are open to considering other or additional outputs in concomitance with the proposal and rationale put forward by the agency.

- We do not expect a synthesis or written review of audience insight research in the C&H field. We expect the supplier to choose the best examples or cases to facilitate the workshop and its materials.

## Costs

The budget for this work is £10,000-£15,000 (including VAT).

## Delivery dates and timelines

We would prefer for the workshop to be conducted by September 2023 however we are open to suppliers' proposals on the timeline. The short, written guide to facilitate continued audience insight-based IE work can be delivered later in the year.

Key dates:

- RFQ issued to suppliers – August 2023
- Suppliers can submit questions by – 10 August 2023
- RFQ submissions due – 14 August 2023
- RFP evaluation period – 14 to 21 August 2023  
No interviews or presentations will be additionally requested from prospective suppliers.
- Notification of award – w/c 21 August 2023  
Contract negotiation, finalisation and signature will follow this.

## Submission details

Wellcome Contact Details

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

Name: Neha Dewan  
Role: Senior Insight Adviser  
Email: [ne.dewan@wellcome.org](mailto:ne.dewan@wellcome.org)

Please send a proposal (no more than three pages) to the Wellcome contact by 14 August 2023.

Please include Company/Institution details; the full legal name, company registration number, and full business address that is submitting the proposal.

The proposal should clearly include, and will be scored against, the following:

Your understanding of the brief and its objectives.

1. **Methodology** - Workshop Plan - provide details of the methodology, and activities to be conducted during the workshop. The plan should reflect your strategy to ensure a safe environment that encourages open dialogue, active participation, and equal opportunity for all attendees as well as details on how you will work with Wellcome to plan and deliver the workshop. A final plan will be agreed closer to the workshop date.  
Scoring: 30%
2. **Delivery requirements and budget** - Detailed approach for delivering this work and accompanying timeline. Please give an indication of resources, infrastructure and equipment you will require to design and deliver this work and any key milestones. Make clear where this deviates from the timelines outlined in this RFQ. Please also include a detailed budget breakdown and costings.  
Scoring: 30%
3. **Knowledge and experience** – Track record of the agency and the delivery team in designing and delivering similar projects (workshops, insight-based workshops). Experience within the climate change, health, or climate and health fields should be highlighted. We would prefer suppliers to include portfolios of past work, in case of CVs please exclude any personal information.  
Scoring: 30%
4. Your organisation's demonstrable commitment to EDI.  
Scoring: 10%

Any questions can be submitted by email to the Wellcome contact by 10 August 2023. Due to the nature and scope of this work, no interviews or supplier presentations will be required.

Selected supplier would be informed w/c 21 August 2023.

### **Additional information for proposals**

We request all prospective suppliers to read this section prior to submitting their proposals.

#### **Non-Disclosure, Confidentiality, and Terms and Conditions**

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.

Suppliers submitting proposals as a registered company should review this [document](#).

Individuals submitting proposals as a sole trader (not registered) should review this [document](#).

### **Prospective Suppliers Personnel - IR35 and Off Payroll Working Rules**

Before the brief 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.

### **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.

### **Funding**

For the avoidance of doubt, the output of this procurement 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 brief 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 brief.

### **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. 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.

## **Accessibility**

Wellcome is committed to ensuring that our procurement 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 procurement exercise, contact the Wellcome Contact.

If, within the proposed outputs of this procurement 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.

## **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 procurement processes.