



Request for Proposal

Capacity building in measurement, evaluation and learning (MEL) in Communications, Brand, Community Engagement and Campaigns (Corporate Affairs)

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1. Objectives

Wellcome is looking for a supplier who can build skills in the Corporate Affairs department in evaluating performance, outcomes and impact of communications, brand, community engagement and campaigns.

The Corporate Affairs department at Wellcome builds trust, reputation and influence to advance Wellcome's strategy and vision through engaging with internal and external audiences. It comprises three broad functions: communications, brand, community engagement and campaigns, and planning and insight. Please refer to [section 7](#) for more details about Corporate Affairs.

This RFP is issued by the Insight team in Corporate Affairs.

This RFP is seeking a supplier to deliver MEL training, accompanying training assets, and coaching support to Corporate Affairs. Objectives of the work are:

- Activate the Corporate Affairs impact framework (in development) and improve staff understanding and confidence in measuring departmental outcomes and impact.
- Build a shared understanding of the purpose and use of MEL at department, programme and team level.
- Build staff skills in using various methods and tools to design and deliver fit-for-purpose MEL activities (e.g., evaluating objective, outcome, impact and process).
- Embed a consistent communications MEL approach to our regular projects and process through coaching support. Examples include annual integrated communications brief, promotion of funding opportunities, researcher engagement and events.



2. Specification

We are looking for a supplier who has a strong MEL expertise in integrated communications, community engagement, brand and issue-led campaign. Additionally, the supplier should have experience in designing and delivering engaging and accessible MEL resources and training to organisations.

The supplier will:

- Run an immersion phase to familiarise themselves with the programmes, activities, planning and delivery process in Corporate Affairs. The supplier should use this phase to review the CA impact framework, assess existing use, gaps, and opportunities in MEL in the department.
- Use the findings from the immersion phase to design and deliver bespoke training and resources that support the objectives in this RFP.
- Provide MEL coaching to two projects. See [section 7.3](#) for examples of projects for coaching support.
- Make recommendations on areas for further improvement to strengthen the department's MEL capacity.

We welcome suppliers to propose the most suitable methodology that will meet the aims and objectives of this RfP. Your proposal should consider the following:

- Training content that is suitable and practical for communications, brand, campaign and community engagement disciplines and for Corporate Affairs function at Wellcome.
- Training and accompanying assets need to be multi-formatted. In addition to in-person delivery of training, these trainings and accompanying assets need to standalone well for those who learn without attending in person. In-person training and the audio-visual and written training materials must be accessible and user-friendly.
- Training should consider different learning and information processing styles and accessibility needs.
- Topics of interests:
 - Principles and key concepts of MEL. In this RFP we refer to MEL as the practice of measuring activities, outputs, outcomes and impact to inform activity design, implementation and improvements. This will include, but is not limited to, programmatic and impact evaluations.
 - How to embed MEL throughout the life cycle of a project or programme, including: setting up an MEL approach at the outset of a project/programme, identifying evaluation and learning questions, data collection methods and sources, collecting data, setting baseline benchmarking, and using data to enable learning and continuous improvement.
 - How to choose which MEL approaches, including tools and methods, for projects and programmes of different scales and life cycle stages .
 - What constitutes good MEL and best practice.



- Recommended metrics, benchmarking or reference data, data sources and data tools that are suitable to the target countries and regions where Wellcome's communication activity happens (Europe, USA, East and North Africa, South and Southeast Asia)
- How to enable measurement and evaluation to support adaptive management and strategic learning in teams, as well as on a department and organisation-level.
- Trends, insights and best practices in equitable evaluation and inclusive data.
- Dedicated time and regular interactions with project owners to coach them through their MEL process.

Deliverables:

- i. Modular training content and accompanying assets.
- ii. 15-25 hours of in-person training, delivered over multiple sessions (suitable for 10-20 participants per session), staggered across 2-3 months to accommodate high workloads of some teams across certain months.
- iii. On-demand training assets that can be used as stand-alone modules for those not attending in-person e.g. onboarding and upskilling new joiners.
- iv. Coaching support for evaluations of **two projects**. Please refer to [section 7.3](#) for examples of projects and areas for coaching support. Exact tasks will depend on project needs, but some examples include:
 - Meetings with project teams / managers to understand project scope and agree areas of coaching support.
 - Co-develop templates for evaluation framework, data capture / collection and reporting (e.g. dashboard).
 - Facilitate team discussions and interactions to agree on MEL approach and ensure a smooth MEL process.
 - Sessions with project team to review the data and reflect on the evaluation or learning questions.
 - Support to refine templates and process.
- v. Practical recommendations on areas for further improvement to strengthen the department's MEL capacity.

3. Timetable & Budget

We expect the bulk of the contract to be delivered between November 2023 – June 2024, though we are open to supplier's suggestion if they wish to propose an alternative timeline that would still meet the objectives and deliverables in this RFP.



Timetable

Activity	Responsibility	Date
RFP issued on Contract Opportunities webpage	Wellcome	5/10/2023
Submission of Supplier Questions	Supplier	11/10/2023
Return of Answers to Suppliers	Wellcome	16/10/2023
Submission of RFP Response (in line with requirements set out in section 4)	Supplier	23/10/2023
RFP Evaluation Period	Wellcome	24/10/2023 – 26/10/2023
Shortlisted suppliers invited to interviews	Supplier	1/11/2023 – 2/11/2023
Notification of contract award	Wellcome	8/11/2023
Contracting Period	Wellcome & Supplier	Early November 2023
Contract Start Date	Wellcome & Supplier Wellcome & Supplier	Late November 2023
Contract End Date	Wellcome & Supplier Wellcome & Supplier	31/10/2024

Budget

£60K – 72K (inclusive of VAT). Coaching support for the integrated influencing and engagement portfolio (see [section 7.3](#)) has an additional budget available of £35K given that it has a larger scope.

4. Response Format

Expression of Interest and Supplier Q&A

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 an organisation or individual
- If an organisation please provide registered name, address, and registration number.
- A non-binding cost estimate as a single figure in GBP
- Any questions you have about the exercise and activity

Prior to the submission of your full proposal to the RFP, 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. If you have any additional questions after this deadline these will not be answered to ensure that this is a fair and equitable process.



5. RFP Response

Please send your proposal of no more than 10 pages in PDF responding to the following questions as part of your RFP Response. We also ask that you attach to your proposal an annex with examples of past training content you have developed and relevant past projects.

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

#	Question
1	<p>Outline your approach for delivering the activities and objectives of this RFP. Please include:</p> <ul style="list-style-type: none">• Methodology that will be used to in the immersion phase and the design and delivery of training, and the coaching.• Your intended approach to delivering the training and coaching, including how you will build in inclusive approaches to delivering training and coaching for participants for different learning styles and accessibility needs (e.g. neurodiversity, disability including deaf colleagues, anti-racist principles).• Use the examples in section 7.3 to illustrate your coaching approach.• How your methodology and approach will meet the outcomes we are seeking in this RFP, including how you plan to assess the outcomes achieved through the delivery of this brief.• Any key challenges and barriers you foresee, and how your methodology enables us to adapt and overcome these challenges and barriers.
2	<p>Please demonstrate:</p> <ul style="list-style-type: none">• Your knowledge and experience of MEL in communications, brand, community engagement and campaign.• Your skills, techniques and experience in MEL training and coaching in organisations.• Your ability to play the role as a trainer, a coach and an evaluator to Wellcome and to the Corporate Affairs department?• The skills, knowledge and experience of the team members who will be conducting the work.
3	<ul style="list-style-type: none">• Outline your stages and timeframes in which you propose the meet the requirements.• Outline your approach to project management, including communication and engagement plan with Wellcome.• Highlight any risks you foresee with meeting Wellcome's requirement and your proposed mitigations to these risks. Describe your approach to risk management.
4	<p>Provide a cost proposal including VAT, which details and justifies the proposed costs to meet our requirement. We understand that the exact cost for the coaching support will depend on scope and requirements of the selected projects. Therefore, please</p>



	<p>provide an indicative cost for the coaching based on the amount of estimated coaching time and background work.</p> <p>Where there are additional areas of support you would like to propose please provide a separate costing option and clear rationale for cost.</p> <p>NOTE: This cost proposal should include your facilitation and your travel to deliver the in-person training.</p>
Annex	Please provide examples of past training content you developed and 2-3 examples of previous work where you have successfully completed a similar project.

Contract Feedback

This section allows Suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. This is the suppliers' opportunity to provide negotiation points on Wellcome's terms and conditions, we will not consider negotiations that are only raised after the contract has been awarded so as not to delay the contracting process. Please ensure you engage with a relevant legal contact if applicable. 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 Standard terms and Conditions [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 6 below).

Information Governance

Wellcome is committed to upholding data protection principles and protecting your information. The [Wellcome-Privacy-Statement-2023.pdf](#) explains how, and on what legal basis, we collect, store, and use personal information about you. This includes any information you provide in relation to this proposal.

Under [GDPR/Data Protection law](#), Wellcome must keep a record of all personal information it is processing (i.e., collecting, using, and sharing). This record will be made available to the Information Commissioner's Office upon request.

This is Wellcome's record of data processing activities which meets GDPR article 30 requirements.

Suppliers will be asked to complete the [TPSRA2](#) assessment before presentation stage to assess how you handle data.

6. Evaluation Criteria

During the RFP evaluation period the evaluation panel will independently evaluate your



proposal against the criteria outlined below. All scores will be collated, discussed and a decision will be agreed on who progresses to the next stage of the procurement exercise.

1. **Methodology** – an effective methodology that delivers the requirements and deliverables and meets the aims and objectives of this brief. Diversity and inclusion considerations should be reflected in your approach, planning, delivery, and in the deliverables of this contract.

Scoring: 35%

2. **Experience** – Demonstration of the project team’s relevant skills, experience, and contextual understanding to deliver this work.

Scoring: 30%

3. **Operational response** – An approach for managing the delivery this work and accompanying timeline that is appropriate and feasible.

Scoring: 15%

4. **Commercial response** - A detailed budget breakdown and costing that is within the budget and meets all the requirements in this brief.

Scoring: 20%

7. Background

7.1 About Corporate Affairs

The Corporate Affairs department at Wellcome builds trust, reputation and influence to advance Wellcome’s strategy and vision, through engaging with internal and external audiences – research communities, policy and decision-makers in the research and health ecosystems.

The department currently has about 100 staff. Corporate Affairs functions include:

Communications: management of Wellcome’s communications channels including the website, our social media channels, email newsletters and Trustnet. Its purpose is to inform and engage Wellcome’s audiences – including staff, researchers and policymakers – to advance our strategy. Specialist areas include Digital Communications and Products, Internal communications, Media Relations, Stakeholder communications, Wellcome Collection Communications and Marketing

Brand Marketing: develop, model and embed Wellcome brand to showcase Wellcome as an inclusive & trustworthy funder, partner and employer. Example initiatives include strategic brand development, Inclusive Communications and Employer Brand.

Campaign and Cultural Partnerships: delivery of ambitious, multi-year campaigns which blend different methodologies and tactics to address systemic issues related to Wellcome’s strategic goals.



Creative: generation of ideas and design-led communication projects using Wellcome's brand identity; build a consistent and coherent identity and tone of voice for Wellcome.

Community Engagement: build relationships with communities around the world to create better contextual understanding around research priorities, to amplify the voice of those most affected and to augment research through community-based knowledge; works with a wide range of partners and exploring how funding and other resources can support collective action towards Wellcome's goals and ensure long-term sustainability.

Planning and Insight: work in partnership with teams across the organisation to identify the communications, engagement and influencing strategies that will advance Wellcome's mission. A major project that's currently led by the team is an audience segmentation project to define Wellcome's global audiences and understand who they are and how best to reach them. Specialist areas include strategic communications, audience insight, communications planning and delivery.

Wellcome adopts matrix working. In addition to delivering function-specific activities, Corporate Affairs staff work across teams and departments to deliver projects and programmes. The strategic communications team leads cross-departmental influencing and engagement programmes in Wellcome's strategic areas of Climate Change and Health, Infectious Disease, Mental Health, and Discovery Research.

7.2 Measurement and evaluative activities in Corporate Affairs

Capacity building is one strand of the impact and evaluation programme for Corporate Affairs which the Insight team is leading. The overall aim of the programme is to develop consistent approaches, frameworks, metrics, and skills so that Corporate Affairs' teams and management can understand what works in integrated influencing and engagement activity in different contexts, track progress against goals, and iterate their work. A high-level CA impact framework is currently in development.

Relevant documents and materials that we will be able to share with the supplier at immersion phase:

- Department annual delivery plan
- Project briefs
- Wellcome annual operational plan
- Corporate Affairs impact framework
- A departmental staff survey conducted in January 2023 on existing use and level of skills in MEL, preference for learning content and learning styles
- Examples of tools, methods and approaches:
 - media monitoring
 - digital analytics
 - wash-up sessions
 - campaign toolkit



- evaluation and impact management approach for Community Engagement in Wellcome's Major International Programmes (in development).

7.3 Types of projects for coaching support

We are looking for coaching support to build the department's MEL capacity in the following types of projects. Please use one or more of these examples to illustrate how you propose to deliver the coaching. Note that you will not be asked to deliver an evaluation of these projects, but to work with the project team as a coach to build their capacity. The final selection of projects will be confirmed after the immersion phase.

- **Annual communication briefs**

Example: Discovery Research bioimaging annual communications brief that delivers funding call promotion and wider researcher engagement activities to stimulate, develop and drive forward discoveries within the bioimaging research field.

Potential areas of coaching support: developing and implementing a MEL approach e.g. scoping and setting an evaluative approach for communications, involving planning and delivery teams in setting meaningful metrics and targets, setting baseline, setting evaluation and learning questions.

- **Communication and promotion of Wellcome's policy products**

Example: the design and promotion of Wellcome's Infectious Disease R&D Ecosystem Vision White Paper.

Potential areas of coaching support: scoping and setting an evaluative approach, involving planning and delivery teams in setting objectives, meaningful metrics and targets, setting baseline, measurement, evaluation and learning questions.

- **Wellcome's international events engagement**

Example: Wellcome's attendance and engagement in United Nations Climate Change Conference (COP), United Nations General Assembly (UNGA), World Economic Forum (WEF)

Potential areas of coaching support: identification and measurement of influencing and advocacy outputs and outcomes, evaluative methods for influencing activities, setting learning questions.

- **Integrated influencing and engagement portfolio for Wellcome's Research Programmes**



Example: A portfolio of projects and activities including agenda-setting campaign, community engagement initiatives, audience insight, and heartbeat communications to advance one or more Wellcome strategic goals.

Potential areas of coaching support: developing a MEL framework, embedding MEL in adaptive management, methods for measuring environment and system changes, assessing our contribution to change.

8. About Wellcome

Wellcome is a global charitable foundation established in 1936. Through our work we support 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 also work with policy makers, run advocacy campaigns, and form partnerships with other organisations to ensure everyone, everywhere benefits from advances in health science. Find out more about Wellcome and our work at: wellcome.org.

9. 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.

10. Equity, Diversity and Inclusion

Embracing equity, [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. We want to cultivate an inclusive and diverse culture, and as we learn more about barriers that disadvantage certain groups from progressing in our workplace, we will remove them.

Wellcome takes equity, 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.

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 long term 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. 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.

14. Funding

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

15. 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.

16. 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.



17. Wellcome Contact Details

The point of contact for this RFP exercise is indicated below:

Name: Yvonne Lo
Pronouns: She / her
Role: Senior Insight Advisor
Email: y.lo@wellcome.org