

## **Request for Proposal (RFP) for Tracking Wellcome's Brand Health and Reputation**

### **1. RFP Background to this Brief**

Wellcome's Brand and Insight teams are looking to commission and collaborate with an organisation who can deliver a multiphase brand research programme and set up a global brand health measurement tracker across our diverse audiences in 12+ countries.

Our audiences and stakeholders include researchers, scientists, practitioners, policymakers, strategic partners across the globe, and Wellcome Collection visitors in the UK, all of whom make a contribution to, or are interested in; life, health and well-being.

The results of this programme of research should enable us to achieve the following outcomes;

1. We are set up to be able to consistently track and action the findings on our brand health and reputation across our audiences and stakeholders.
2. We have delivered baseline results ready to present to our Executive Leadership team by the end of July 2024 and our Board of Governors by the beginning of September 2024.
3. We feel confident that we are tracking the right factors, for the right audiences and stakeholders, and that we have a rounded programme that can help us understand the drivers behind the results.
4. We have the insight to able to create compelling and responsive brand communications, campaigns, and initiatives, as a result of understanding how our different audiences relate to our new brand values and beliefs.
5. We know how to build an emotive connection between Wellcome and our audiences and stakeholders over time, as a result of understanding the one unifying factor about Wellcome and its mission, values, and beliefs, that drives that emotive connection for our audiences and stakeholders.
6. We're able to use the knowledge from this programme of research to understand where our audiences are on our brand building journey and inform our key decisions for driving our brand's Key Performance Indicators.

We are looking for a partner that can help us deliver against the following requirements:

#### **Requirements of this work:**

The requirements are set out here in two separate workstreams. We would prefer a single supplier that has the skills and experience to deliver against both workstreams, however we recognise that some agencies may specialise in one of the workstreams only, and we are open to splitting these two workstreams out. For those agencies who can respond to both workstreams we are open to different elements of each being combined within the research design.

It is essential that we ensure that we can present baseline findings on brand health and reputation to our Corporate Affairs Leadership Team, Executive Leadership Team and our Board of Governors on the dates given below. With this in mind, we would welcome your ideas on how we might achieve qualitative research, followed by quantitative research in this limited period of time, allowing for decent internal consultation at key stages.

## **Workstream #1 Tracking brand health and reputation**

1. Conduct research with our global audiences and stakeholders to identify and explore the factors driving trust and reputation of Wellcome in relationship to our mission, strategy, beliefs, and values. This foundational research will ensure that we use insight to design the right tracking programme, choose the right metrics, and use the right methods.
2. Use the findings and analysis from the foundational phase to formulate recommendations for a sustainable brand health and reputation tracking insight programme (mixed method). This will include the recommended brand health and reputation characteristics to track, metrics, suitable methods, and appropriate benchmarks for comparison. The design needs to be robust, credible, and repeatable while being open to changes in the scope of geographies and should consider challenges in sample recruitment.
3. Support the Wellcome team to consult with key internal stakeholders to achieve adoption of the recommended programme design, and the recommended brand health and reputation characteristics to track.
4. Execute the adopted approach to deliver year one/baseline findings, including delivering comparator findings.
5. Support the Wellcome team to develop papers, presentational materials and present the foundational research and baseline findings on our brand health and reputation, to around five teams in Wellcome. The teams include our Corporate Affairs Leadership Team (Early August), our Executive Leadership Team (Mid-August), and our Board of Governors (Papers beginning September). Note these are fixed deadlines.

## **Workstream #2 Brand values and beliefs, Unifying brand insight**

1. Conduct qualitative research with our global audiences and stakeholders to understand and explore our audience and stakeholder's response to Wellcome's new brand beliefs and values. Note the objective is to inform the execution of our brand strategy and activities rather than to reformulate the beliefs and values.
2. Conduct qualitative research with our global audiences and stakeholders to understand their emotive connections to Wellcome, its mission, beliefs and values and identify one over-arching or unifying emotive connection to the brand that could sit at the centre of our brand strategy and its execution.
3. Deliver actionable insights and recommendations to inform; any iteration of our existing brand journey map, the execution of the brand strategy, how we can approach brand communications, campaigns, and initiatives in responsive and culturally appropriate ways.
4. Support the Wellcome team to develop presentational materials and present the findings and actionable insights to around five teams in Wellcome.

## 2. About Wellcome

Wellcome is a global charitable foundation based in London. Wellcome has no living founder, no shareholders, donors or political allegiances.

Wellcome improves health for everyone by funding science and research, and working to ensure people benefit from advances in health science. Collaborative research that involves a diverse range of people from different fields of interest is key to progress in health science – and to achieving our aim of fostering a healthier, happier, world. We're taking on the biggest health challenges facing humanity – climate and health, infectious disease, and mental health – to find urgent solutions and accelerate preventions. Find out more about Wellcome and our work at: [wellcome.org](https://wellcome.org)

In October 2020 we set out our mission to 'support science to solve the urgent health challenges facing everyone'. Science is essential to solving the world's health challenges. This is why supporting bold and creative research across a wide range of disciplines to discover more about life, health and wellbeing and open up unimagined possibilities for the future has remained at the core of Wellcome's mission since 1936.

Our strategy 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.

In parallel Wellcome works with a wide range of partners around the world, including governments, research funders, non-governmental organisations, charities, community organisations and the private sector, influencing and informing policy to help create the conditions for science to thrive globally and improve human health.

We plan to spend £16 billion between 2022 and 2032 on our mission supporting science to solve the urgent health challenges facing everyone. Our work is underpinned by five core beliefs:

- 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 it's our duty to take on risks and tough challenges – especially when others aren't.

By 2032, Wellcome will have enabled fundamentally important breakthrough discoveries in research and transformations in mental health, infectious diseases, and climate and health. We will have championed positive changes across the research community to maximise opportunities for opening up new fields of research, and for translating knowledge into new

health solutions. We will be known for our bold, ambitious approach to funding, driven by our mission, for embedding in our work the needs and priorities of those most affected by health challenges, and for achieving the adoption of science-based solutions.

We have four strategic programmes through which we will deliver our ambitions. They are Mental Health, Climate and Health, Infectious Disease, and Discovery Research. Find out more about Wellcome and our work at: [wellcome.org](https://www.wellcome.org).

In 2023, Wellcome worked with staff to co-produce a set of shared beliefs and values that aligned with our vision and mission. These beliefs and values will underpin all our work and will be instrumental in the future development of Wellcome as an entity, our reason for doing what we do and how we do that. The beliefs are detailed above, how we will deliver our mission is explained through our values. These are:

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

Wellcome aims to achieve its mission through a number of avenues and partners as shown in the Table 1 below. Some of these avenues are directly delivered by the parent brand, Wellcome, such as grant funding, product platforms. Family brands, such as Wellcome Collection, are closely aligned with Wellcome brand strategy whilst partner organisation, such as those under major portfolio, co-funded institutes, international programmes, centres, and institutes, may use the Wellcome brand but not follow the Wellcome brand strategy.

**Table 1:** Shows the full Wellcome brand architecture.



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This RFP is focussed on measuring and understanding the brand health and reputation of the parent brand “Wellcome” however, we recognise that all the avenues, and partners are likely to contribute to the perceptions of Wellcome and play a part in the levels of trust and reputation we have with our stakeholders and audiences. We are keen to understand how

these different touchpoints contribute to driving overall brand health and reputation in the Wellcome brand.

### 3. Why do we need this research?

To achieve its goals Wellcome needs to reach, engage and influence a wide variety of audiences and stakeholders including researchers/scientists, policy makers and influencers, strategic partners, investment audiences, communities and people who are experiencing the health challenges we work on and Wellcome Collection visitors. Wellcome employees are an important stakeholder, they are the subject of another project, and the focus of this RFP are external audience and stakeholders.

Our ability to build trust, live our values, and to effectively engage and influence these audiences and stakeholders will be dependent on what they know, think and feel about Wellcome.

The brand health and reputation tracker (and any underpinning qualitative work) will be used at senior levels, as well as within the brand team, to provide an important barometer of how our reputation and trust in Wellcome is faring, where we are doing well and signals of where we may need to look deeper. This includes how we are performing against the newly developed beliefs and values which were launched internally in October 2023, with a plan to externally roll out in early 2024. For this insight to be actionable, understanding the *why* behind the *what* will be an important feature in a brand tracking programme.

Since the launch of the new strategy in 2022, we haven't conducted a consistent and comparable measure of our brand health and reputation across all audiences and stakeholders.

The most recent indicators of Wellcome's brand health and reputation have emerged from:

- Late 2022, research into perceptions of Wellcome was undertaken amongst policy makers and influencers.
- Comments on reputation have arisen in other research studies.
- Anecdotal feedback from stakeholders.
- There is some legacy work from the reputation model developed by our former Communications department which was then used to get some baseline results back in 2018. We anticipate that some of this work will be out of date due to the time it was produced and the UK focus.

We would share the relevant reports upon commission.

While the regular tracking programme will give us the barometer, the qualitative work will help ensure that our brand and communications work set off on the right foot with our audiences and stakeholders.

The insight that will result from this work will give us a rich resource that will inform our brand strategy, including identifying needs and opportunities for brand communication and campaigns, especially those focussed on that singular emotive connection to Wellcome and the mission. It will also provide insight that can inform high level principles in the creative execution of our communications and engagement work, so we can make sure we are communicating values-based content in ways that resonate across the different sectors and cultural contexts that our audiences and stakeholders occupy.

#### 4. RFP Specification

**This brief is seeking a research partner/s, or a research collective, with strong credentials in:**

- Global brand, brand health and reputation insight and application of findings to a strategic context, including informing brand strategy, brand campaigns and brand communication.
- Global brand, brand health and reputation research, and baseline tracking (mixed method)
- Devising and measuring scalable global brand health tracking frameworks and metrics for similar sectors and audiences/stakeholders, including comparator measurements.
- Application of multivariate analysis to understand drivers of trust and reputation.
- Application of rich methods of research such as cultural analysis, ethnography, semiotics, linguistics
- Utilizing insights to develop brand journeys and maps that highlight the current positioning of different audience segments in our brand health and reputation journey.
- Identifying unifying factors that drive emotional brand connection for audiences and stakeholders, and framing findings to inform brand strategy and execution.
- Recruiting and conducting quantitative and rich qualitative research with global B2B, political, academic, high-level stakeholders, and Civil Society Organisations.
- Working with in-house brand teams to convert insights into strategic recommendations.
- Deep listening and working consultatively and collaboratively across senior teams.
- Developing options analysis and working with senior teams to achieve consensus and buy-in to findings and recommendations.
- Strong programme management and stakeholder engagement skills
- Versed in EDI practice and skilled at translating this into programme design.

##### 4.1 Audience and Stakeholders

Our audiences and stakeholders, both those we currently reach, engage and work with and those we want to reach are varied, diverse and geographically spread across the globe. Details of audience categories can be found in this section.

**Researchers:** Wellcome audiences include a wide variety of researchers from different disciplines who we currently fund or who are interested in receiving funding on projects related to our 4 strategic programmes of Discovery Research, Mental Health, Climate and Health and Infectious Diseases. Researchers could include biologists, clinical researchers, social scientists, data scientists, public health scientists.

**Influencing:** This comprises individuals and organisations who may be influential within the science/research sector and/or within the wider global health system including think tanks, governments, organisations, pharmaceutical companies, multi-laterals, NGOs/charities, as well as influential scientists and researchers. These influence audiences may operate at local, national, and global levels.

**Table 2:** Shows the full breadth of types of audiences and stakeholders that fall under the research and influence categories. Table 2 – Research and Influence Audiences and Stakeholders

Strategic programme	Research		Influence	
	Current researchers	New researchers we want to reach and engage	Research ecosystem	Health system
<b>Climate &amp; Health</b>	<ul style="list-style-type: none"> <li>Biological scientists</li> <li>Public health scientists</li> <li>Epidemiologist</li> <li>Climatologists</li> </ul>	<ul style="list-style-type: none"> <li>Social scientist e.g. behavioural scientists, economists, human geography political scientists</li> <li>Data scientists (e.g. Disease / climate modellers), including statisticians and trialists</li> <li>Applied scientists e.g. material scientists, physicist, engineers, architects</li> <li>Environmental/Earth scientists, e.g. hydrologists, meteorologists, plant scientists, climate scientists,</li> <li>implementation and evaluation scientists, scientists working in relevant sectors e.g. water &amp; sanitation, transport, agifood systems, landse, energy, housing, sustainable development.</li> </ul>	<ul style="list-style-type: none"> <li>Public Funders/Foundations</li> <li>Non-public Funders/Foundations</li> <li>Private Sector</li> <li>Think tanks</li> <li>Research dept. in governments</li> <li>Climate research institutions</li> <li>NGOs/charities (in some contexts)</li> <li>Policy research institutions, Development / sustainable development research institutions science journalists, journal editors (e.g. health, environment journals),</li> <li>Leamed societies e.g. Intacademy Partnership, African Academy of Sciences</li> </ul>	<ul style="list-style-type: none"> <li>National governments</li> <li>Policymakers (including urban/regional planners)</li> <li>NGOs/charities</li> <li>Multilaterals</li> <li>Practitioners / civiociety organizations</li> <li>C&amp;H campaign and advocacy groups</li> <li>Private Sector</li> </ul>
<b>Discovery Research</b>	<ul style="list-style-type: none"> <li>Life science researchers</li> <li>Experimental medicine</li> <li>Clinical researchers</li> <li>Allied health professionals</li> <li>LMIC researchers</li> <li>Population health researchers</li> <li>Tool and technology developers (applied to DR remit)</li> <li>Social science researchers (includes Anthropology, Sociology, Political Science, and Psychology, Bioethicists</li> <li>Humanities researchers (related to DR).</li> <li>Physical sciences researchers</li> <li>Foundational data scientists (including stats &amp; modelling)</li> </ul>	<ul style="list-style-type: none"> <li>Advanced data scientists (including Artificial Intelligence &amp; Machine Learning)</li> <li>Social science (includes Anthropology, Sociology, Political Science, and Psychology, Bioethicists</li> <li>Humanities researchers (related to DR).</li> <li>Physical sciences researchers: physicists, chemists, statisticians, mathematicians (the latter two don't always count in this category)</li> <li>Ethicists</li> </ul>	<ul style="list-style-type: none"> <li>Institution/University leadership</li> <li>Regulators</li> <li>Pharma</li> <li>BioTech</li> <li>Science and health related policymakers</li> <li>Other notfor profit actors e.g. Science Philanthropy Alliance</li> <li>Leamed societies: Royal Society, British Academy etc.</li> <li>Funding partners</li> <li>Public Funders/Foundations</li> <li>Non-public Funders/Foundations</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>National governments</li> <li>Policymakers</li> <li>NGOs/charities</li> <li>Multilaterals</li> <li>Government Research and Development</li> </ul>
<b>Infectious Disease</b>	<ul style="list-style-type: none"> <li>Infectious disease scientists</li> <li>Foundational data scientists (including stats &amp; modelling)</li> </ul>	<ul style="list-style-type: none"> <li>Advanced data scientists (including Artificial Intelligence &amp; Machine Learning)</li> <li>Software developers</li> <li>Non-academic healthcare professionals</li> <li>Ethicists</li> </ul>	<ul style="list-style-type: none"> <li>R&amp;D dev</li> <li>Clinical trial networks</li> <li>Surveillance networks</li> <li>Pharma</li> <li>Tech</li> <li>Regulators</li> <li>Public Funders/Foundations</li> <li>Non-public Funders/Foundations</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>National governments</li> <li>Policymakers</li> <li>Multilaterals</li> <li>NGOs/charities</li> <li>Non-academic healthcare professionals</li> </ul>
<b>Mental Health</b>	<ul style="list-style-type: none"> <li>Biomedical and psychological scientists (including neuroscience, cognitive sciences)</li> <li>Psychopharmacology researchers</li> <li>Clinician researchers (psychiatrists, psychologists, MH nurses, etc.)</li> <li>Humanities and social sciences academics with specific MH interest including medical historians, ethicists</li> <li>Lived experience researchers</li> </ul>	<ul style="list-style-type: none"> <li>Data sciencespecialists (including digital/tech specialists, public and private sector)</li> <li>Biomedical scientists in "novel" fields related to MH but not currently working on MH (e.g., immunology, microbiome)</li> <li>MH researchers in industry or pharma</li> <li>Researchers who are also entrepreneurs (e.g. product developers, those working in focused research organisations, startups, spinoffs)</li> </ul>	<ul style="list-style-type: none"> <li>Public Funders/Foundations</li> <li>Non-public Funders/Foundations</li> <li>Regulators</li> <li>Journal editors (general medical and mental health research)</li> <li>Science journalists (e.g., NY Times, Guardian)</li> <li>Private sector: pharma, biotech, digital</li> </ul>	<ul style="list-style-type: none"> <li>National Governments</li> <li>Multilaterals</li> <li>Charities/NGOs</li> <li>MH advocacy groups</li> <li>Policymakers</li> </ul>

We are currently working with a supplier to develop a cross-cutting segmentation of research and influence audiences that will inform the way we define our audiences for our communications and brand strategies in the future. We will need to understand how our brand health and reputation differs between each of the segments.

The segmentation is being developed using a programme of quantitative and qualitative research with a cross cutting sample of the audiences shown in table 2. The quantitative-based segmentation solution is scheduled to be developed by early April 2024 with further deep-dive qualitative research scheduled to be undertaken in late Spring 2024 with the segments. 'Golden questions' will be developed enabling segments to be recruited in future research and/or analysis of a sample to be undertaken to identify segments post-data collection.

In your response, please consider the options for incorporating the audience segments, into sampling and/or at the analysis stage.

We will need to understand our brand health and reputation with a wider set of audiences and stakeholders that may fall outside of the above-mentioned segmentation study. Please find more details about them below

**Highly Influential Stakeholders:** there are a small number of high-level stakeholders who's views on Wellcome can be highly influential in research and policy areas. Please consider how you would recommend incorporating this small number of influential voices into the programme of work to measure and understand brand health and reputation.

**The Public:** The public show up in our work in various ways through targeted programmes of work, such as cultural programming, our community engagement, Wellcome Collection, lived experience involvement, and as end beneficiaries of our work.

We reach affected communities and those with lived experience through partners such as community groups, health care practitioners, lived experience experts, civil society organisations and suggest that it is these types of organisations whose views on our brand health and reputation we are most interested in. We would like recommendations on strategies and methodologies for effectively incorporating this audience and stakeholder group into the project plan, demonstrating a tailored approach to engaging different sub-sets of the general public in the research.

**Wellcome Collection audiences:** As mentioned in Section 2 (About Wellcome), Wellcome Collection is an integral part of the Wellcome family and is directly connected to the overall Wellcome mission and is an integral part of how we deliver our strategy.

Wellcome Collection is a free museum and library that aims to challenge how we all think and feel about health. Wellcome Collection brings social, cultural, historical, personal and artistic perspectives to Wellcome's work, informing the research we fund, interventions we support, and deeper understandings of health across society. Through exhibitions, collections, live programming, digital, broadcast and publishing, we create opportunities for people to think deeply about the connections between science, medicine, life and art.

Wellcome Collection's primary target audiences are UK based, with an ambition to specifically target and drive-up visitor numbers and engagement amongst young people 14-19 years, racially minoritized groups, those with disabilities, people from low-income status backgrounds, communities reflected in the Collection, such as those with lived experience as well as research and influence audiences and stakeholders.

## **4.2 Sampling and Geography**

Wellcome has global ambitions, and this project will need to deliver an understanding of our brand health and reputation 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 possibly be undertaken include UK, Germany, Belgium (Brussels), U.S, Singapore, South Africa, Kenya, Malawi, Uganda, India, Indonesia, Thailand and Vietnam. Please note that additional countries associated with our Africa and Asia Programmes that we work closely with might be included in the scope of the geographies. Please see the list of countries included in our Africa and Asia Programmes in Annex 2.

We envisage the sampling involved in this research to come from a combination of Wellcome contacts and supplier recruitment. Contact details of research audiences and stakeholders known to Wellcome, including those who are currently funded and those who



have applied for funding can be contacted through our CRM database however, contact details of those in the policy/influence audiences including senior influential and strategic partners are held by individuals and teams across Wellcome. Please be aware that many of the contact details we currently hold have a UK bias.

Please ensure your proposal considers how you will effectively address any recruitment and fieldwork challenges in the regions highlighted with any restrictions on capability and capacity related to countries made clear.

### **4.3 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.

### **4.4 Key Dates & Deliverables**

#### **Key Dates**

- a. Final reporting of the baseline brand health and reputation research by the 29th of July 2024
- b. Formal presentation of the baseline brand health and reputation research to the Corporate Affairs Leadership Team week commencing 5<sup>th</sup> August
- c. Co-develop a paper with the Wellcome project team to be submitted to the Executive Leadership Team (ELT) by the 27<sup>th</sup> August 2024.
- d. Co-present findings to ELT on the 2<sup>nd</sup> September 2024
- e. Co-develop a paper with the Wellcome project team to be submitted to the Board of Governors (BoG) by the 6<sup>th</sup> of September 2024
- f. Co-present findings to BoG on the 23<sup>rd</sup> or 24<sup>th</sup> Sept 2024

## Deliverables

### **Workstream #1 Tracking brand health and reputation**

A multi-phase project plan that includes all the below phases and deliverables to accompany them:

1. **An immersion phase:** Understand Wellcome's mission, strategy, internal perspectives, and experiences on drivers of reputation and trust. Gain insights into the users of the tracking programme and their needs. We estimate you'll need to speak to around 15 Wellcome teams.
2. **Internal stakeholder communication and management plan:** Develop a comprehensive plan covering all project phases, this includes a consultation and sign off plan for key decisions – such as agreeing programme design and metrics.
3. **Mixed methods research and analysis plan:** Formulate and agree a plan that achieves the key objectives of the research.
4. **Option Analysis and Recommendations:** Provide insights and recommendations, and a deck to share with internal stakeholders for the overall approach to brand health tracking, including recommended health metrics for the first year and onward. Note: this may follow a phase of global fieldwork if a phase of the fieldwork is to inform the design and approach of the over-all programme and baseline tracking.
5. **Global fieldwork phase/s & analysis** – Execution of research phases across quantitative and qualitative research phases. Define sample structures, research and data collection methods, timeline, sampling strategy and data analysis plan for effective execution, conduct the research and deliver the findings, including datasets with all crosstabs ready for analytical purposes.
6. **Reporting and Presentation:** Preparation of qualitative and baseline findings decks, and papers to key internal audiences on the findings of any qualitative research and the baseline results to five key stakeholder groups including: Core project team, Corporate Affairs Senior Leadership Team, Executive Leadership Team, Board of Governors. This includes co-presentation to these core groups.
7. **Project management and key risks & mitigations plan:** A full project management plan, including identification of potential risks including technical complexities, resource constraints, and communication breakdowns, with corresponding mitigation strategies, contingency plans, and a structured monitoring and reporting framework that includes regular status meetings, contact reports, and risk registers to ensure proactive risk management across all aspects of project management.

Please note for this work we need 3-4 weeks for engagement and sign-off with key stakeholders at critical junctures such as sample agreement, questionnaire signoffs or when agreeing on a framework or a model. Please account for this when providing timelines.

### **Not included in the deliverables**

The following items are not included in the deliverables but are noteworthy:

- **Qualitative deep dive on the baseline findings of the qualitative research.**  
Depending on the results, we think that it will be valuable to do a qualitative deep dive on the baseline findings for some of the findings, or segments. Although we appreciate that the timelines are tight to integrate this aspect into the presentation of the findings due for beginning of August 2024, please do include this in your response if you believe this can be done within the parameters of this request. Otherwise, we are likely to commission this following the presentation to the board.
- **Annual tracking and research** – this request do not cover ongoing fulfilment of annual tracking for the brand health and reputation metrics (or agreed frequency) and any supporting research. However, if you are well placed to provide this service, please do feel free to describe your capabilities and case studies in your response (1 additional page).

### **Workstream #2 Brand values and beliefs, unifying brand insight**

A multi-phase project plan that includes all the below phases and deliverables to accompany them:

1. **An immersion phase:** Understand Wellcome's mission, strategy, internal perspectives, and experiences on drivers of reputation and trust. Gain insights into the users of the tracking programme and their needs. We estimate you will need to speak to around 15 Wellcome teams.
2. **Internal stakeholder communication and management plan:** Develop a comprehensive plan covering all project phases, this includes a consultation and sign off plan for key decisions – such as agreeing programme design.
3. **Mixed methods research plan:** Formulate and agree a plan that achieves the key objectives of the research.
4. **Global fieldwork phase/s & analysis:** Research and analysis plan and execution of research phases across qualitative research. Define sample structures, data collection methods, timeline, sampling strategy and data analysis plan for effective execution, conduct the research and deliver the findings.
5. **Reporting and Presentation:** Preparation of findings decks, and papers to key internal audiences on the findings of any qualitative research and the baseline results to five key stakeholder groups including: Core project team, Corporate Affairs Senior Leadership Team, Corporate Affairs. This includes co-presentation to these groups.
6. **Project management and key risks & mitigations plan:** A full project management plan, including identification of potential risks including technical complexities, resource constraints, and communication breakdowns, with corresponding mitigation strategies, contingency plans, and a structured monitoring and reporting framework that includes regular status meetings, contact reports, and risk registers to ensure proactive risk management across all aspects of project management.

Please note for this work we would need 2 weeks for engagement and sign-off with key stakeholders at critical junctures such as sample agreement, questionnaire signoffs or when agreeing on a framework or a model. Please account for this when providing timelines.

## RFP Timetable

#	Activity	Responsibility	Date
1	RFP issued on <a href="#">Contract Opportunities</a> webpage	Wellcome	1 December 2023
2	Submission of Expression of Interest and Supplier Q&A	Supplier	11 December 2023
3	Return of Supplier Q&A to Suppliers	Wellcome	18 December 2023
4	Submission of RFP Response (in line with requirements set out in section 5)	Supplier	18 January 2024
5	RFP Evaluation Period end	Wellcome	w/c 22 January 2024
6	Supplier Presentations	Supplier	w/c 29 January 2024
7	Notification of Contract Award	Wellcome	w/c 5 February 2024
8	Contracting	Wellcome & Supplier	Early February 2024
9	Contract Start Date	Wellcome & Supplier	Mid February 2024

### 5. Response Format

#### Expression of Interest

Suppliers are invited to submit a maximum of 2-page long expression of interest (EOI) by email to the Wellcome contact 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).
- A case study of where you have successfully provided solutions to research problems 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.

Submitting an EOI is not a binding commitment to submit a full proposal should your organisational priorities change; you will not then be penalised for future opportunities.

#### Supplier Q&A

Together with 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.

## 6. RFP Response

Please send us your full proposal of no more than 20 pages by the date in our timetable. A full proposal should show us the following:

- i. Your proposed approach with details of your multi-phase programme plan that fits the needs and constraints.
- ii. A timing plan to accompany your approach that delivers to the key dates outlined in the section 4.4
- iii. A good understanding of the novelty and complexity of this work which includes risks and assumptions underlying your proposal along with your recommendations for contingency to build into the work and should ensure long-term sustainability of the study.
- iv. Diversity and inclusion considerations reflected in your approach, planning, delivery, and in the deliverables of this contract your understanding of Wellcome's commitment to EDI, our inclusive communications principles and where it needs to show in the design of this reputation model.
- v. Costs based on your advice on methodology, sample size and the associated respondent recruitment approach.
- vi. An outline of your approach to project management, including communication and engagement plan with Wellcome
- vii. Any recommendations on the key deliverables
- viii. Your knowledge and experience working on similar projects including 2 case studies with global orgs, preferably in NFP sector and with non-consumer audiences.
- ix. Brief details of the project team assigned to this programme. We would like to see teams that reflect the diverse nature of our audiences and stakeholders.
- x. Your organisation's actions and policies on Equity, Diversity and Inclusion
- xi. A budget proposal including a breakdown of costs and any optional elements that is not more than £900k including VAT for both workstreams.
- xii. If you are applying for workstream #1 only your budget proposal range is between £600k to 700k including VAT. We understand that based on indicative set of countries it will not be possible to do give us the exact cost. Please set out estimated additional costs per country more than 12 countries.
- xiii. If you are applying for workstream 2 only your budget proposal range is between £200k to £300k including VAT. Costs should be based on your advice to get us a robust and meaningful sample across geographies, cultures, and contexts.

### Contract Feedback

This section allows Suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. Wellcome will not consider any requests that are raised after this point. Please ensure you engage with a relevant professional to support your feedback if required. Include your contract feedback in your proposal as an annex 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 8 below).

### Information Governance

Wellcome is committed to upholding data protection principles and protecting your information. The [Wellcome privacy webpage](#) 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 are asked to complete the [TPSRA2](#) assessment before the RFP submission deadline for Wellcome to assess how you handle data.

## 7. 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.

Criteria	Detail	%
Approach	An effective programme design and methodology/ies that deliver 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.	35%
Experience	Demonstration of the project team's relevant skills, experience, and contextual understanding to deliver this work in a global context.	20%
Operational response	An approach for how you will manage the delivery of this work to project timelines and excellence, including an assessment of key risks and questions, and accompanying timeline that is appropriate and feasible	25%
Commercial response	A detailed budget breakdown and costing that is within the budget and meets all the requirements in this brief.	20%
<b>Total:</b>		<b>100%</b>

## **8. 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.

## **9. 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.

## **10. 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 \(www.gov.uk\)](#). 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.

## **11. 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.

## **12. 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.

### **13. Funding**

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

### **14. 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.

### **15. 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.

### **16. Wellcome Contact Details**

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

Name:	Secil Erden
Pronouns:	She/her
Role:	Senior Insight Advisor
Email:	s.erden@wellcome.org



## Annex 1

### Our brand 'nexus'

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## Annex 2

### Wellcome Partnerships: Africa and Asia Programmes (AAPs)

AHRI - African Health Research Institute - South Africa - <https://www.ahri.org>

KWTRP - KEMRI Wellcome Trust Research - <https://kemri-wellcome.org>

MORU - Mahidol Oxford Tropical Medicine Research Unit - [www.tropmedres.ac](http://www.tropmedres.ac)

MLW - Malawi-Liverpool-Wellcome Clinical Research Programme - <https://www.mlw.mw>

OUCRU - Oxford University Clinical Research Unit - <http://www.oucru.org>