



Request for Proposal (RFP): Inclusive communications progress review

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Please note that this document has been updated on 15th March, 2024 with minor clarifications to the process outlined. The brief itself remains the same.

Background

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.

At Wellcome, we're proud of our brand, otherwise known as 'who we are', which comes in three parts:

- Our **beliefs** define Wellcome's view of the world and why we have a mission to change it for the better. They focus our decisions, set out what we stand for and against, and inspire us to do our best work.
- Our **values** guide how we behave, work and lead – both individually and as an organisation. They set out what others can expect when they work with us, and what we can expect of each other.
- Our **mission** brings us together behind a common purpose, determines our strategy, and sets out what we're doing to improve health for everyone.

Each part is detailed in the annex.

Why being inclusive is so important to us

Our mission is to support science to solve the urgent health challenges facing everyone. Saying that our work seeks to benefit everyone means we need to ensure this happens in practice. Our beliefs and values inform and support our mission: two of our beliefs have strong implications for our inclusive communications and practice, and we have committed to our 'inclusive' value that "we are an inclusive employer, funder and partner". You can read more information about our wider [Equity, Diversity & Inclusion \(EDI\) goals](#) on our website.

Our offices are in London and Berlin, but we seek to both fund science and impact globally. We fund science across the world and are often encouraging researchers from outside the UK to apply for our funding calls. We have [major partnerships](#) in seven geographies: the UK, Malawi, South Africa, Kenya, Thailand, Vietnam and India. We also seek to work in six key geographies for our policy, advocacy and campaigns: UK, US, Germany, Kenya, South Africa, India, as well as the European Union (EU).

'Inclusive' as a concept can mean different things in different geographies. We must ensure that our inclusive communications support our internal teams and those we work with to communicate inclusively in each of these local contexts.

The original inclusive communications audit

In November 2020, the Wellcome Trust commissioned [an audit of our communications](#). The purpose was to get a snapshot of how Wellcome's internal and external communications outputs aligned with Wellcome's diversity and inclusion, anti-ableist and anti-racist aims. The audit pointed out areas we needed to work on in our communications by reviewing our content, channels and processes.

The audit considered:

- Snapshots of media coverage of Wellcome, particularly momentous periods like Wellcome's response to the COVID pandemic
- Wellcome's social media channels
- The [Diversity, Equity & Inclusion hub](#) on Wellcome's public facing website
- 15 stakeholder interviews, including with people of colour, disabled folk and stakeholders in the intersection of both
- Senior management interviews with Director of Corporate Affairs and the Associate Director of Culture, Equity, Diversity and Inclusion
- Two listening sessions with Wellcome's staff networks Wellcome Race Equity Network (WREN) and Disability Interest Group (DIG)

Wellcome's 7 principles of inclusive communication

We worked with our external advisors to distill the audit's findings into a handbook called ['The 7 principles of Inclusive Communication'](#). This formed the basis of our inclusive communications approach in Corporate Affairs. The 7 principles are:

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 experiences through our communications
5. We use inclusive language
6. We amplify minoritised voices
7. We are never neutral in the face of injustice that stands in the way of our mission

The Inclusive Communications principles were piloted across Corporate Affairs from July 2022 to December 2023. Teams in Corporate Affairs had access to many resources including expert advisors, training sessions, quarterly progress reviews and internal-led weekly drop-ins.

Moving forward, this guidance needs to be more embedded into the everyday tools staff use, such as Trustnet (our intranet), Frontify (where we host our brand guidelines), and inclusive language guidance, which will launch this year.

Purpose, objectives and deliverables

The purpose of the inclusive communications progress review is twofold:

1. To measure how much our communications reflect our guidance in a way people can notice internally and externally.
2. To understand where we can make more progress towards being an anti-racist and anti-ableist brand.

Objectives:

We would like to understand:

1. progress Wellcome has made/not yet made in inclusive communications directly and indirectly since January 2020, including challenges, blockers and opportunities for our teams to practice the inclusive communications guidance through their work.
2. top recommended focus areas for Wellcome to drive greater impact through inclusive communications – ideally areas that are applicable to several teams at the same time.
3. the exact guidance to support teams to communicate inclusively as a global brand and in all influencing geographies.
4. how to embed our inclusive communications guidance into the inclusive value in the simplest way possible.

Deliverables:

Research	<ul style="list-style-type: none"> • Desk research: <ol style="list-style-type: none"> a. Touchpoints outlined under ‘channels and samples’ include the same areas as the original audit for direct comparison, plus some new touchpoints that we’d like to review. b. External research: looking to the outside world to understand best practices on inclusive communications in our target geographies to inspire and inform our teams and guidance. • Interviews: with 1. 12 staff members across core Corporate Affairs teams, 2. the team that manages beliefs and values as a whole and inclusive communication as part of the ‘inclusive’ value (a group of four), 3. Senior management (Director of Corporate Affairs, Associate Director of Sustainability and the Director of Equity, Diversity and Inclusion) • Focus groups: with 1. Corporate Affairs champions (20 champions spread out across four or five focus groups) and 2. EDI representatives (a small group)
Progress report & recommendations	<ul style="list-style-type: none"> • Red, Amber, Green (RAG) report based on findings from analysis, with a risk register that outlines how we are living our anti-racism & anti-ableism goals, and inclusive communications guidance. We are interested in a comprehensive risk assessment. We welcome your expertise in identifying and addressing any potential risks across processes and outputs.

	<ul style="list-style-type: none"> • Recommendations for how to develop a path to green for Amber/Red categories, or how to further develop progress on Green category in coming one to three years. • Two raw PowerPoint presentation decks: 1. high-level view and 2. more detailed view of recommendations. Will be used to present at different levels of the organisation. • Presentation to Corporate Affairs department about findings
Updated inclusive communications guidance and embedding into inclusive value	<ul style="list-style-type: none"> • Updated core guidance text for internal and external audiences. It should come in a format that makes it quick and easy for our internal audiences to understand and use in practice. Note: if you think another format is more appropriate than text, please include this in your recommendation and any breakdown of additional resources or budget that would be required. • Profiles for each influencing geography and major international programme outlined in 'About Wellcome' section: a quick and easy to understand guide of inclusive communications considerations in each geography, including: key historical/social/political considerations to be aware of, symbols/colours/words of significance for when we communicate, any differences in inclusive communications terms used, languages spoken. We have advisory groups in all our major international programmes and they are happy to advise as part of the research. • Workshop with team that manages both beliefs and values and inclusive communications as part of the 'inclusive' value. Agenda will be to explore and evaluate approaches to embed inclusive communications guidance into the 'inclusive' value. Desired outcome will be to find simplest approaches, which require the least capacity of teams to manage day to day.

Channels and samples

These samples will be provided. Samples will broadly come from four categories:

1. **External facing communications** – includes examples of public initiatives and campaigns like our podcast, our various social media channels, website, digital marketing, documents like our annual report as well as media snippets about Wellcome during a 2-month period (to replicate the initial audit).
2. **Internal facing communications** – includes examples from our intranet, documents for internal usage like our Tone of Voice draft as well as internal communications that went out alongside key media moments.
3. **Inclusive Communications programme resources** – internal resources that capture progress made and challenges faced during the programme. We will share:

- teams' progress panel preparation sheets sent ahead of progress panels and write ups from consultants
- thinking on how we can move from externally held progress panels to workshops that we facilitate internally
- insights from a department-wide survey, designed to capture qualitative feedback about how the Inclusive Communications pilot went from our colleagues' perspectives.

4. **Internal Processes** – includes processes that govern how teams work with external suppliers, manage internal communications, media briefings and press releases.

Please note: all our communications samples will be in English.

Each content under each category has a team responsible for its production:

Category	Content	Content owner
External facing	Podcast	Public initiatives
	Requests for Proposal (RFPs)	Procurement
	Annual report	Internal & stakeholder communications
	Wellcome Photography Prize Instagram	Public initiatives
	Wellcome Collection Instagram	Wellcome Collection comms & marketing
	Wellcome website	Digital
	2 months of media snippets and 3 months of social media channels	Media
Internal facing	Trustnet	Internal communications
	Tone of Voice draft	Brand
	Internal communications that were paired with key media moments	Internal communications/media
Inclusive communication programme	Progress panel preparation sheet and write ups from consultants	Brand marketing
	Internal survey findings	Brand marketing
Internal processes	Request for proposals	All teams
	Media briefings	Media
	Press releases	Media

Formats

All deliverables need to be easy-to-read and quickly actionable. Here are examples of the people who will use the guidance:

1. **A media manager** who only has a few hours to find a spokesperson, brief them and get them on a radio or live TV broadcast (we've found that rules and 'red lines' will be remembered and adhered to, e.g. "Wellcome does not speak on all-male panels".).

2. **A digital content producer** who needs to write informative articles for an external channel like a webpage, script, or marketing material.
3. **A copywriter** who needs to write persuasive copy for an advertisement for Wellcome.
4. **A communications manager** who needs to brief an agency who is working on tight deadlines. We'd send the supplier version of the guidance with our brand guidelines.
5. **A photo editor** who is tasked with picture research to illustrate a web story.
6. **A project manager** working on the Wellcome Photography Prize who is developing a global marketing and communications strategy and activity plan.
7. **A people manager** who needs to articulate the guidance to their teams.

Process and timing

Activities	Responsibility	Date
RFP issued	Wellcome	6 March
Deadline for proposals	Supplier	2 April
Invitation to pitch	Wellcome	11 April
Pitches	Supplier	16-18 April
Supplier selected	Wellcome	22 April
Contract awarded and start date confirmed	Wellcome and supplier	26 April
Kick-off meeting	Wellcome	30 April
Progress review – first draft	Supplier	29 May
Progress review – delivered	Supplier	5 June
Workshop about findings and recommendations	Supplier	17 June
Updated guidance – first draft	Supplier	19 June
Updated guidance – delivered	Supplier	28 June

We welcome any questions about the RFP up until the submission date. Please be advised that we will need 24 hours to respond, and the deadline for proposal submission is 2 April, as in the timeline above.

We are flexible on the timeline outlined in the process section as long as the final work is delivered on 28 June. However, we would require regular progress updates and to see a draft version of the final document in good time. This is to ensure that the project stays on track and meets our objectives within the specified timeframe. We welcome your proposed timeline and adjustments as needed.

Budget

£70k incl. VAT

As a charitable foundation, we will favour proposals that look at value for money. How would you spend our budget and how can you help our budget go further?

Who we want to work with and how

Terms and conditions

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

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.

Organisations, individuals and collaborations

'We believe diversity of people and expertise leads to richer understanding and more impactful discoveries' (Wellcome's third belief). That's why we want to work with many different organisations and people to deliver this work.

We also recognise that this Request for Proposal includes different deliverables and spans several geographies and areas of expertise. If you think your experience, knowledge and skills are well suited to one part of the brief – and would be interested in partnering up with organisations or other people to deliver the wider set of deliverables – do let us know. We will be very interested to hear from you.

Welcoming different approaches

We know that there's not just one way of doing things, too. While the timings are set and we know what we want to achieve, we would love to hear how you would like to approach this. For example, you might propose to review guidance and best practices before doing the qualitative research. We're looking for you to get to know our organisation and bring your skills and knowledge to this work – so talk to us! Ask us questions, and feel free to suggest new and different ways of working to reach these outcomes.

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.

Our beliefs and values

We love these! They unite us around what we believe in, what we stand for and against (beliefs), and they help us share expectations of how we want to work together (values). To really get to know us, you'll need to understand our beliefs and values. It would be great to see how you're thinking about them in your response, right through to the final deliverables.

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.

Equity, Diversity and Inclusion (EDI)

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 EDI as part of our RFP processes.

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](#). 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 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 brief for all communications is as indicated below:

Name: Aishwarya Viswamitra

Role: Brand Officer

Email: a.viswamitra@wellcome.org

Our brand – who we are

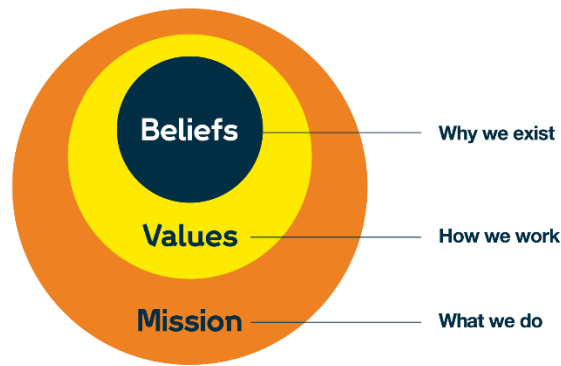


Figure 1 Wellcome's core brand makes up who we are

Image description: Wellcome's core brand is represented by three circles housed within each other. The innermost circle is dark blue and titled 'Beliefs', with a straight line linking it to the phrase 'Why we exist.' The middle circle is yellow and titled 'Values,' with a straight line linking it to the phrase 'How we work,' and the orange outermost circle is titled 'Mission,' with a straight link linking it to the phrase 'What we do.'

At Wellcome, we're proud of our mission, supporting science to solve the urgent health challenges facing everyone. It's what we do. And what we do, together with why and how we do it, defines who we are – it's our brand.

Our brand is made up of three parts:

- Our **beliefs** define Wellcome's view of the world and why we have a mission to change it for the better. They focus our decisions, set out what we stand for and against, and inspire us to do our best work.
- Our **values** guide how we behave, work and lead – both individually and as an organisation. They set out what others can expect when they work with us, and what we can expect of each other.
- Our **mission** brings us together behind a common purpose, determines our strategy, and sets out what we're doing to improve health for everyone.

Wellcome's beliefs, values and mission in detail

Beliefs

1. We believe in the power of science to create knowledge that builds a healthier future for everyone.

Scientific research is essential to a healthier future. It enhances our understanding of life, health and wellbeing, and what can be done to protect and improve them.

That's why we support people to explore important questions, open new fields of inquiry, and apply insights to solve the urgent health challenges facing everyone.

2. We believe science has its greatest benefits through collaborative action across society..

Scientific research is essential to a healthier future – but can't achieve it alone. To be applied to meet the needs of people and communities, research insights must be trusted, wanted and useful.

That's why we engage with governments, industry and civil society, and the wider public, to ensure positive and lasting impact.

3. We believe diversity of people and expertise leads to richer understanding and more impactful discoveries.

No one can predict where every health breakthrough will come from. Involving people from different backgrounds and disciplines, and with different lived experiences of health, will improve opportunities to discover, innovate and solve. This can only happen if our systems are inclusive by design.

4. We believe everyone's experience of health matters, and everyone should be able to benefit from science.

We care about health because it matters to people's lives. That's why we explore meanings of health in social, cultural, historical, clinical and personal contexts. It's also why we strive to make the benefits of science accessible, affordable and acceptable to everyone, including the communities most affected by health challenges.

5. We believe we should take on risks and tough challenges – especially when others aren't.

As an independent foundation, we aren't bound by the interests of shareholders, donors or governments. That gives us more freedom than most to take the long view, speak up, and take on risks, always in the interests of people's health. We must use this freedom deliberately, to take on difficult or complex challenges others might not.

Values (full descriptors below)

- **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

The values must be considered as a set. We expect that there may be tensions between them. For example, being brave at the same time as being inclusive. Sometimes we will need to dial

values up or down, but never at the expense of living out the other values.

Our values will be woven throughout everything we do and will play out in a variety of ways. For example, our values will define the nature of all interactions any stakeholder will have with us, our tone of voice for our communications, and our organisational culture. You can see examples of strategic implications and behaviours per value in the table below.

Mission

Science to solve the urgent health challenges facing everyone.

Strategic implications and behaviours per value

	Transformative	Thoughtful	Inclusive	Brave
One-liner	We always strive to make a significant difference.	We consider the consequences of our actions and our impact on people, society, and the planet	We respect all people and perspectives.	We stand by our beliefs and push boundaries.
Descriptor	Our focus is on achieving meaningful lasting benefit, whether quickly or over time.	We think carefully about the benefits and risks before we act and care about how our actions affect people.	We are an inclusive employer, funder and partner. We are determined to be anti-racist, anti-ableist, and involve the broadest range of people.	Our actions are driven by Wellcome's beliefs. We set ambitious goals, make space to experiment, and see failure as an opportunity to learn.
Example strategic implications	<ul style="list-style-type: none"> • We take on difficult challenges if they could pave the way for longer term gain. • We create and transform systems and environments to catalyse others making an impact. • We are confident to stop projects when we can see they are not effective. 	<ul style="list-style-type: none"> • We weigh up the benefits and consequences of our strategic choices before we commit. • We make space to reflect and learn from all we do. • We offer benefits and ways of working that support staff wellbeing. • We ensure managers nurture the aspirations and needs of their teams. 	<ul style="list-style-type: none"> • We proactively look to diversify the people we hire, partner with and fund. • We build inclusive processes and do not allow exclusionary behaviours or processes to go unaddressed. • We create psychologically safe environments. • We build an inclusive brand and culture that is anti-ableist and anti-racist. 	<ul style="list-style-type: none"> • We make space, systems and processes for failure and experimentation. • We confidently communicate what we stand for and against. • Our decisions are informed by Wellcome's core beliefs rather than our personal ones.

Example behaviours	<ul style="list-style-type: none"> • We don't just do things, we change the way things are done. • We celebrate the smaller steps that lead to bigger change. 	<ul style="list-style-type: none"> • We take time to offer/reflect on constructive feedback. • We show we think about people through our actions. • We are kind to colleagues and collaborators, even when under pressure. 	<ul style="list-style-type: none"> • We behave and communicate inclusively, using inclusive language. • We proactively include people from marginalised and minoritised groups. 	<ul style="list-style-type: none"> • We take measured risks that help achieve our mission. • We speak up when something goes against our values or beliefs.
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