# discussion guide – current fundees

## Notes and context

* This is a discussion guide for 90m discussion groups with **current fundees (individual, institutional, initiatives)** of Wellcome
* We will also ask them to fill in a pre-task which should take 5-10 mins
* We may make more specific versions of this guide for specific groups within the ‘current fundee’ category:
  + - There may be some change to timings depending on the ultimate format of the groups – e.g. in person vs. online, etc
    - Some sample groups may be better engaged in individual interviews, in which case timings will decrease and approaches to some questions will change
    - We are also likely to include specific prompts for specific groups (e.g. different countries and/or different types of fundees)
    - And we are likely to tweak wording of the guide when translated into local language
* Notes in italics (*like this)* are only for Humankind and Wellcome, and won’t be shared with participants
* We will also likely take the conversation in ways not entirely covered by this guide, being led by participants (within reason), for example exploring points of similarity or difference between their responses. This is why the guide itself may appear quite short, as it just covers the core questions which we will then probe around

## Discussion flow (to be filled in once guide finalised)

## Pre-task

*Objective: understand their relationship with Wellcome, both for context and to unearth any drivers of trust and reputation. Note: This will be emailed to participants in advance, with them asked to share their response by email. Where they don’t have email or prefer not to write, we will arrange an alternative (e.g. text or phone)*

Please answer the following in writing and email it to xxxx in advance of the group. We’d love to know:

* Would you consider yourself to have a relationship with Wellcome? If so, how would you describe this relationship?
* What was your first experience of Wellcome? It might have simply been hearing the name (in which case we’d like to know where), seeing it in a job ad, entering the Wellcome Collection, through a professional event… or anything else!
* How else have you engaged with Wellcome? This may be through funding, visiting the Wellcome Collection, listening to the podcast… or anything else? We’d love to know every different way you’ve interacted with them
* Is there anything that stands out as especially good or bad from your relationship with Wellcome?

Thank you very much! We look forward to meeting you in the group

## Section 1: Introductions (10 mins)

*Objective of this section: moderator meet participants and form a bonded group*

* *Moderator to introduce themselves, and the session:*
  + Doing this research on behalf of Wellcome
* Moderator impartial and neutral – so **you can be totally honest (nothing will be attributed to anyone personally)**
  + Keen to hear from everyone
  + Introduce any viewers
  + **Permission to record? Press record**
  + Any questions before we begin?
* *Ask participants to introduce themselves (moderator do first):*
  + Name, organisation, role, and a non-professional highlight of the last week (big or small)
* *Ask each participant in turn:* what are some of the values that are most important to you in how you live your life?

## Section 2: Them, their careers and funders (15 mins)

*Objective of this section: gain underlying insights about them and their sector needs which could contribute to a unifying insight that connects them to Wellcome.*

* *Moderator:* “The bulk of today’s discussion will be focussed on you in your professional role”. **How would you sum up what drives you in professional life?** *Explore similarities and differences*
* **Do you ever feel any conflict between personal and professional self? What’s the biggest example of this?**
* **Which aspects of your work do you find most appealing personally?** *Or what makes you get out of bed to go to your job in the mornings?*
* What does a really good day look like to you? *if struggling – could ask them to imagine going home at the end of a really good day – what has happened?*
  + **Who** else might have been involved to give you a day like this?
* **Which milestones in your career have been most meaningful to you?**
* **And what are the professional concerns which keep you awake at night?** Everyone just shout out one! *Note that people likely to say lack of funding, funding instability unstable tenure, unstable careers – acknowledge these then ensure we go beyond* 
  + How do those tend to get solved?
  + What greater help do you need to solve them?
* **If you had a magic wand to have whatever you needed to achieve your job, what would you choose?**
* Can you describe a situation where you felt unsupported in your role?
  + What extra support did you feel you needed?
  + Who do you think could provide that support?
* What do you find hardest in your job?
* If things work out well in your role, what do you see happening in the next 5-10 years?
  + What help do you need to get there?
* **What excites you the most about the future of your sector?**
* **“Now we’re going to be thinking about institutions in your health focus area which may invest in research *(clarify if necessary that this means funding),* engage people on the topic, influence change”.** **Firstly, what kind of orgs come to mind? *Looking for beyond Wellcome – keep general at this stage***
  + **How do you feel about these organisations generally?**
  + What do they bring to your life?
  + Are there any values that are important to see from these kinds of organisations? Why are these important?
* How do you feel about being connected to funders who also play a broader role in creating change in the health ecosystem? Does this make you feel any differently compared to ‘pure’ funding?
* **What do funding organisations bring to your life? (beyond the money) *steer away from finance if becoming too transactional***
* *If struggling to answer the above* – if you were writing a letter to a funder to thank them for their grant, how would you talk about what it’s brought to your life? *Participants can write down if helpful*
* **At best, how do you want a funder to make you feel? Moderator to capture on whiteboard (virtual or IRL)**
  + **Why do you want to feel that way?**
  + **Have any funders given you that feeling? Who / how?**
  + **How have they delivered on your needs?**

## Section 3: Wellcome (5 mins)

*Objective: gain context on their Wellcome relationship, and explore what Wellcome could mean to them*

* “thank you for filling in the pre-tasks about your Wellcome relationship”
* **To start with, what are the top 3 words or feelings that come to mind when you think of Wellcome?**
* How well do you know Wellcome? Do you feel you know them well enough to form a proper opinion about them?
* **When you think of Wellcome, what are you imagining? *(to get a steer on how they conceptualise Wellcome – is it just the building; the money; particular people; a sub-brand, etc.)***
* ***(only if relevant)* how does being part of [x family brand] affect how you feel about Wellcome?**
* Looking back at our responses on how we want a funder to make us feel (look at whiteboard from end of section 2), which of these feelings does Wellcome deliver? *Probe around responses*
* **What does Wellcome offer that nobody else can?**
* Imagine if Wellcome changed how it operates to have the best impact on YOU (this is of course hypothetical!):
  + What role would it play in your life?
  + How would that make you feel?
  + What would have to change from now to deliver on this?
  + What makes you think that Wellcome could offer this?

*Moderator to encourage participants to think beyond Wellcome’s role as a funder*

## Section 4: Wellcome vision and mission (5 mins)

*Objective: to provide context for the values and beliefs so that the brand is explored holistically; and surface any major reputational issues relating to vision and mission. Note: this is NOT a deep exploration of the vision and mission which is beyond the time and scope of this research*

#### Moderator show stimulus A: Wellcome’s vision and mission. Introduce as Wellcome talking about its vision and mission

* **How far do you connect with Wellcome’s vision and mission?**
  + **Which bits do you connect with?**
  + **Which bits less?**
* Does the **vision** feel right for Wellcome?
* Do you feel like Wellcome is currently delivering on its **mission**? *Probe for examples of how or not*
  + What would have to change in Wellcome’s behaviour to better live up to its mission?
* **What kinds of guiding principles or values would you expect Wellcome to have?**

## Section 5: Wellcome’s beliefs (15 mins)

*Objective: understand how the beliefs resonate and align, the expectations they establish and whether Wellcome is living up to those*

* *Moderator:* “Wellcome have 5 core beliefs. They aim to bring the organisation together around an articulation of philosophy, motivation and purpose, and inspire their strategic choices”

*Moderator show stimulus B: the 5 beliefs*

* How do you feel about these beliefs as a set?
* **To what extent do they align with your personal and professional beliefs about health and science?**
* **Do these fit with what you know of Wellcome? Why / not?**
* **Do they make you think of any other organisation? Which / why?**
* **Do any of the beliefs stand out as particularly resonant for you?**
* **… or less resonant?**
* How do they make you feel about Wellcome?
* Is there anything in the wording of any of the beliefs which particularly appeals?
* … or doesn’t appeal?
* **Is there anything else that stands out to you here based on your cultural perspective / context? Positively or negatively? *Moderator to be explicit if unclear, e.g. as someone who is based in / from Kenya***
* **“now thinking through each belief, to what extent do you see this reflected in how Wellcome operate today?” *Participants to mark each out of 10 (aiming for consensus but exploring any dissonance)***
* For those with higher scores, what have you seen from Wellcome that suggests they’re living up to this belief?
* For those with lower scores, what does Wellcome need to do to align with this belief?
* **How well do the beliefs fit with the vision and mission we just looked at?**
* Are there any specific beliefs that fit better with vision and mission? Or less well?
* Or are there any parts of the beliefs that should be emphasised – or downplayed – for better fit with vision and mission?

*Moderator show stimulus C: beliefs with detail*

* **How do these make you feel?**
* Do any of them increase resonance / feeling of alignment with Wellcome?
* Do these add anything to your understanding of Wellcome ?

## Section 6: Wellcome’s values (10m)

*Objective: understand how the values resonate and align, the expectations they establish and whether Wellcome is living up to those*

*Moderator*: “Wellcome has 4 values which define how they work, and the type of organisation they need to be to deliver the mission we looked at earlier. These should guide culture, behaviour, ways of working, and tone of voice in communications. First we’ll show you a description of each value”

*Moderator show stimulus D: value one liners*

* How do you feel about these values as a set?
* **To what extent do they align with your personal and professional values?**
* **Do they make you think of any other organisation? Which / why?**
* **Do any of the values stand out as particularly resonant for you?**
* **… or less resonant?**
* How do they make you feel about Wellcome?
* Is there anything in the wording that particularly appeals? Or doesn’t?
* **Is there anything else that stands out to you here based on your cultural perspective / context? Positively or negatively? *Moderator to be explicit if unclear, e.g. as someone who is based in / from Kenya***
* **“now thinking through each value, to what extent do you see this reflected in how Wellcome operate today?” *Participants to mark each out of 10 (aiming for consensus but exploring any dissonance)***
* For those with higher scores, what have you seen from Wellcome that suggests they’re living up to this value?
* For those with lower scores, what does Wellcome need to do to align with this value?
* **How well do the values fit with the vision and mission we just looked at?**
* Are there any specific values that fit better with vision and mission? Or less well?
* Or are there any parts of the values that should be emphasised – or downplayed – for better fit with vision and mission?
* Finally, if you had to sum up each of these with a one-word adjective *(moderator can give examples if unclear)*, what would you use?

*Moderator show stimulus E: value one liners with single word values*

* **For each value, do these words fit with how you understood the phrase?** *Compare to the suggested word in the last answer*

*Moderator show stimulus F: values with descriptors*

* Do any of these descriptions make any of the values more resonant and compelling to you?

## Section 7: drivers of reputation (15m)

*Objective: understand the unique drivers of Wellcome’s reputation, and how other frameworks/metrics fit in; as well as what a positive reputation delivers*

* “We’re interested in what drives how you feel about Wellcome… we’ve already discussed lots of aspects of the organisation today including beliefs and values, as well as your relationship with them”
* **When forming an opinion about an organisation like Wellcome, what are the key considerations that you take into account when making a judgement?**
* Is there anything more you’d like to know about Wellcome to help make this kind of judgment?
  + Why would that be important?
* **Over the course of your relationship with Wellcome, what’s made you feel positive about them?**
* **Could you describe a moment that’s made you feel particularly connected to Wellcome?**
* **And what’s made you feel less positive about them?**
* **Thinking about your needs/expectations from orgs like Wellcome (e.g. discussed in section 2), to what extent do you feel they deliver on these?**
  + **Which more?**
  + **Where do you see the gaps?**
* Have your opinions about Wellcome ever been influenced beyond direct interactions with them? Who and how? *Probe around media, experts, influential individuals, colleagues etc*
* **Now, with all this in mind, what do you think are the most important factors determining how you feel about Wellcome?** *Moderator to capture on whiteboard – can lead with some thoughts based on the previous answers*
  + Which factors are more important?
  + And which factors are less important?
* *Moderator to show stimulus J: standard drivers of reputation –* are any of these particularly important for determining how you feel about Wellcome? Which would we add to the list? *Probe particularly around the* ***more*** *important and add these to the list; though also interesting to know whether any are particularly unimportant*
* **If you perceive Wellcome really well (i.e. it delivers on the factors at the top of the list), would that change your feelings or behaviour at all? *Probe around behaviour including advocacy, if this comes up, and what this means***
* **If you feel less positive about Wellcome, would that change anything for you at all? *Probe around e.g. stop working there; not apply for funding; not accept funding***
  + **What would “feeling bad about Wellcome” look like to you? How bad would things have to get for your behaviour to change? (*testing hypothesis that “it’s all about the money”)***
* **In general, thinking about everything you know about it, do you think Wellcome is a trustworthy or untrustworthy organisation? Why do you say that?** 
  + *IF TRUSTWORTHY:* Over the next few years, what might be the key threats to its trustworthiness, what could undermine its trustworthiness?
  + *IF UNTRUSTWORTHY OR NEUTRAL:* What are the key things which Wellcome needs to do to make it more trustworthy, and how should it go about doing those?
* For people in similar roles to yourself, are there any practical implications of being able to trust Wellcome, in terms of your behaviour, actions and your interactions with Wellcome?
  + If so, what are they?
  + Why does trust drive these actions/behaviours?

## Section 8: emotional connection hypotheses (5-7m)

*Objective: get response to specific hypotheses about emotional connections to Wellcome – encourage them to think about what their emotional connection could be*

*Moderator show stimulus G: emotional connection hypotheses*

* **“These are some things other people have said about what connects them to Wellcome”.Do any of these resonate with you? which / why?**
* Do any resonate less? Which / why?
* Do these prompt any further thinking about what Wellcome brings to your life?
* **If you had to sum up what Wellcome means or could mean to you, what would you say?**

## Section 9: legitimacy (5-7m)

*Objective: explore the factors that provide or detract from Wellcome’s legitimacy, as an important component of brand health. Note: this could be downgraded / addressed more quickly if running out of time*

* **How legitimate do Wellcome feel as an organisation aiming to solve the urgent health challenges facing everyone?** What drives that? *Moderator can flash up Wellcome vision and mission if needed, to ensure legitimacy contextualised in mission*
* Do any of the factors we discussed (on white board) create legitimacy?
* What about the beliefs and values?
* What beliefs and values would a legitimate organisation have?
* Or does legitimacy require something different? If so, what? *Moderator can probe around the following forms of legitimacy if relevant: cognitive (Do I understand what the organisation is doing?), regulative (Are they following the law?), pragmatic (Does this organisation work for me?), and moral (Are they doing the “right” things?)* 
  + *Also ensure specific Wellcome benefits drawn out e.g. independence (if not already)*
* **Is there anything that particularly detracts from Wellcome’s legitimacy?** Again, keeping its vision and mission in mind. *Moderator probe on the following if not emerged spontaneously, and ensure understanding of why they might be or not be concerns re. legitimacy:*
  + *Being based in UK*
  + *Unelected*
  + *Henry Wellcome*
  + *Wellcome history as a pharma company*

## Section 10: summary and close (2-3m)

*Objective: affirm thanks for their input and help us understand what is salient to them (i.e. what they remember)*

* “We’re nearly ready to bring this discussion to a close now”
* Thinking about everything we’ve discussed, what is the most important thing Wellcome should bear in mind in its behaviours and communications?
* Do you have any other advice to share with Wellcome before we close?
* Do you have any further questions?
* *Moderator thank and close*