



Request for Proposal (RFP) for CSID Community of Practice (CoP) Delivery Partner

1. RFP Background

Wellcome supports science to solve urgent health challenges facing everyone: ensuring no-one is held back by mental health problems, controlling escalating [infectious diseases](#) in communities that are most affected, and preventing [climate change](#) from harming the health of communities it affects the most. At the intersection of these latter two areas is the issue of escalating infectious diseases due to climate change, for example an increase in vector-borne diseases (such as malaria) due to vectors (such as mosquitos) being able to survive in environments whose temperatures were previously too hostile.

The [Data for Science and Health](#) team aims to ensure trustworthy data science transforms how science solves these urgent health challenges. To achieve this, we support projects that produce innovative tools using health data, motivate and equip data scientists, and build trust into how data science is funded, governed, and practiced. For example, we recently announced an [open call](#) for researchers and software developers to build and contribute open-source software tools that can further Wellcome's cross-cutting vision to address the escalating burden of infectious disease due to climate change (CSID call).

The CSID call is awarding funding to researchers to develop modelling tools for Climate Sensitive Infectious Diseases (CSID). This RFP complements the CSID call by building a wider community of practice (CoP) around CSID methods. We are looking to appoint a 'convenor' that can build this CoP for CSID modelling.

A productive CoP should:

- 1) showcase novel tools in the field of CSID modelling;
- 2) facilitate better quality open-source research;
- 3) support more early-stage researchers to engage in software development;
- 4) ensure existing tools are findable, usable, and do not go to waste;
- 5) promote best practices in software development, modelling, and promotion of CSID tools;
and
- 6) connect policymakers, researchers, and software engineers to ensure outputs are relevant to end-user needs.

Wellcome will provide **£2m for up to 5 years** in order to facilitate the formalisation and expansion of a productive CSID modelling CoP.

2. RFP Objectives

2.1 Scoping, planning and designing a CoP

The support provided by a CoP convenor, and the mechanism through which this is achieved need to match the needs of the community being serviced.

The infrastructure developed to support the CoP will depend heavily on the chosen mechanism and the Supplier is expected to adapt their plans accordingly. For example, a Supplier could offer to incorporate a new charity (e.g. [NumFocus](#) or [RECON](#)), organise an annual conference (e.g.



[EPIDEMICS](#)), start a new journal (e.g. [JOSS](#)), or actively convene a language-specific software community (e.g. [rOpenSci](#)). Below is a more detailed summary of three different CoP convening organisations. This is not an exhaustive list, nor is its purpose to limit what applicants should consider suggesting, rather we hope it will serve as a primer to better illustrate the role of a CoP convenor.

Example 1: NumFocus

[NumFocus](#) is an internationally recognised charity that promotes open-source software across a range of scientific purposes. NumFocus [sponsors](#) some of the most widely used open-source software in the world, including *NumPy* and *pandas*, as well as open-source languages including *Julia*, and open-source communities, such as *rOpenSci*. Fiscally sponsored projects in NumFocus represent the best of the best and are provided with services including financial administration, legal support, and access to resources to raise money for the project. As well as sponsoring projects, NumFocus also has high profile non-sponsored affiliated projects including *Spyder* and *theano*. NumFocus helps these projects by building a community, promoting the software, and providing funding via grants, [Google Summer of Code](#) (GSoC) or [Outreachy](#) projects. The latter is particularly valuable for long-term growth and sustainability. The success of NumFocus is reflected in its large and numerous [corporate sponsors](#), it's clear understanding of community desires, which even includes [merchandise](#) and strong [online presence](#).

NumFocus focuses on general software and modelling tools, they are primarily concerned in long-term sustainability of software via corporate sponsorship. The Supplier should make clear how their chosen mechanism will build a practice around CSID tools and how key stakeholders will be engaged.

Example 2: rOpenSci

rOpenSci is a CoP in itself, though is funded by NumFocus. A software package that is submitted to rOpenSci goes through a strict peer review and, if accepted, is recognised as a leading package in R within the topic area. rOpenSci engages with the community via [Twitter](#) (33.4k followers), regular [community calls](#), and [events](#). rOpenSci promotes packages by [listing them](#) on its website.

One of the challenges of this mechanism is in findability of software (they include much more listed than on NumFocus) and raising of money. Suppliers considering any mechanism that 'accepts' many software packages should address how software will be findable and how the CoP will attract funding.

Example 3: EPIDEMICS and Epidemics

CoPs do not necessarily have to be built around open-source principles themselves and a Supplier could consider a community built around a new journal and/or conference. [EPIDEMICS](#) is an international respected conference for infectious diseases dynamics with supporting publication [Epidemics](#). Epidemics accepts papers on infectious disease dynamics. The conference is supported with traditional sources of funding (price of admission and sponsorship, etc). Several journals are widely recognised within the academic community for accepting submissions that describe software papers, for example [Bioinformatics](#) and [JMLR](#). Limiting a CoP to a journal only is not recommended as this may limit the audience to academics only. However, many conferences are well attended by industry experts and policymakers, especially when the topic is of wide-reaching importance. In this example, the journal is specifically associated with the conference, however this need not be the case and a Supplier may instead launch a conference after finding support from an existing journal. [Keystone Symposia](#) exemplifies a more flexible structure for a conference with multiple events a year and collaborations with multiple journals. Notably they include [financial aid](#) to improve the accessibility of the events.

For any mechanism, Suppliers are encouraged to demonstrate why their CoP will have an impact within all key user and audience groups and, in particular, to demonstrate why the software will not be lost inside academia amongst many other open-source tools.

2.2 Implementing the CoP strategy and development

The Supplier is expected to provide a detailed scoping report of existing CoPs and to clearly justify their chosen form of community (Section 3 (i)). The Supplier is expected to agree with Wellcome the chosen strategy and a plan for implementation. The Supplier will create the CoP and is expected to have the infrastructure in place to grow the community, which at the very least will include an online presence and may also include plans for an initial conference or launch event. The Supplier is expected to liaise with third parties as necessary for event organisation, online submission platforms, etc. We encourage applicants to be ambitious and innovative in their plans but expect a clear Gantt chart to clearly outline the timeline of the Supplier's plans. In addition, the Supplier should include evaluation metrics (for example [CHAOSS](#)) to quantify the ongoing impact of their CoP (e.g. online interaction, conference attendees, etc). The Supplier should forecast these metrics for the first 5 years after establishment.

Climate sensitive infectious diseases currently mainly affect low- and middle-income countries. The CoP should align with Wellcome's strategies and should ensure engagement with low resource settings, and regions predicted to be most vulnerable to the impacts of climate change. The Supplier is expected to demonstrate how stakeholders in these regions will be engaged in an equitable manner.

2.3 Creating a long-term sustainability and governance framework for the CoP

Wellcome are providing £2m funding for a Supplier to design and develop a CoP. The Supplier will be evaluated based on their proposed timeline however Wellcome anticipate the contract lasting 3-5 years. The resulting community should have a clear strategy and accountability framework. The Supplier will be responsible for identifying key stakeholders, a steering group to



ensure the community is practical and useful, and a clear governance framework with leaders appointed.

In addition, the Supplier must make the long-term sustainability plans clear, which may involve additional grant funding in the mid-term. If depending on a donation model, then the Supplier is expected to engage potential funders before the contract end, which may be NumFocus, corporate sponsors, or any other organisations. If the Supplier intends to make use of multiple revenue streams and sources of community engagement, these should be incorporated sequentially and not all at once. We will be rewarding strategy and quality over quantity.

3. RFP Specification

We seek to commission a Supplier who will have the following responsibilities:

Scope existing communities of practice for open-source projects:

There are many existing communities for open-source software in particular research areas. Three prominent examples are given above. We would like a full scoping review of existing CoPs, their mission and sustainability plan, a critical analysis of their successes and challenges, and a short report on their governance, structure, communications strategy, and community engagement.

Identify and engage key stakeholders:

Based on the initial scoping report and expert knowledge of the field, the Supplier will engage key stakeholders to support the community. The Supplier is expected to engage with stakeholders from Phase I of the CSID open call. The Supplier should state how stakeholders will be engaged, which can build upon existing frameworks such as the [CSCCE Community Participation Model](#).

Develop and implement a governance framework:

The Supplier will develop a management structure to oversee the community, as well as developing a governance framework, which should include relevant parties across Wellcome as the primary stakeholder. Additionally, the Supplier is expected to put in place an advisory board formed of experts on open-source software, community building, and at least one expert with a CSID background.

Develop and implement a long-term sustainability strategy:

Based on findings from the initial scoping report and dependent on the chosen community mechanism (e.g. conference, journal, etc), the Supplier will create a plan for long-term sustainability that should make clear how the community will be grown and developed in the mid-to-long term (after 2+ years) and how the community will be funded. The Supplier should clearly report 5- and 10-year strategies. The strategy should include a clear financial plan dependent on the community type, for example a budget for hosting conferences, or for funding software, etc as well as an evaluation of impact after 5 years. The Supplier should additionally include a breakdown of expected maintenance costs after the contract ends.

Design and develop a communications and outreach strategy:

The Supplier is expected to design community branding including a name, logo and online- and offline-designs. If required, the Supplier should engage third-party marketing and design specialists. The Supplier is further expected to develop a clear communications and outreach strategy and to put this into effect. This should include at the very least: a community website, Twitter, and GitHub organisation. The outreach strategy will depend on the nature of the community and the Supplier must clearly identify and separate outreach of software



organisations, individual developers, non-developer researchers, industry experts, and policymakers.

Design and develop a framework for community involvement:

The Supplier is required to make clear how software developers, researchers, experts, and policymakers will interact within the community. This should include high-level decisions which will depend on the community type, for example at a conference developers may present to non-developers, but this interaction is less clear for journals or other charities. We will expect the Supplier to be creative and to create an exciting community for the developers and non-developers alike. The Supplier is also expected to develop a code of conduct and safeguarding procedures if relevant (e.g. if contributors may be under 18 years of age).

Develop software inclusion and exclusion criteria:

The Supplier should develop criteria for inclusion and exclusion of software, this may include details such as: open-source licensing, community branding, code of conduct, etc. In addition, the Supplier should consider how software will be FAIR, and may wish to partner with another organisation (e.g. ReSA) to achieve this purpose.

Deliverables to be included are (but not limited to):

- Full scoping report of existing CoPs for open-source software;
- Short report setting out plans for new CoP with justifications for decisions based on initial scoping report and prior experiences;
- Stakeholder engagement plans;
- Development and implementation of a governance framework including legal oversight where required;
- Development of a sustainability plan with 5- and 10-year outlooks;
- Development of a community brand including name, logo, unified online and offline designs;
- Development of community engagement plan including profiles of key community profiles and how they can engage with the community;
- Development of inclusion and exclusion criteria for software.

In addition, the Supplier will be responsible for:

- A. *Reporting:* The Supplier will be responsible for developing a reporting pipeline to keep Wellcome and other relevant governance structures up to date on progress, expenditure, and risk registry.
- B. *Financial management:* Budget management and accounting will be under the Supplier's responsibility; regular reporting against cash flow will be required.
- C. *Partners relationship management:* Owning and maintaining the relationships with stakeholders essential for the successful delivery of the project. This includes collaborators and sub-contracted delivery partners.
- D. *Legal support:* The Supplier will be responsible for outsourcing the legal support needed to set up the legal framework for the community in terms of template data sharing agreements, relevant contracts and IP advice where required.

The Supplier is expected to set out and justify their own 2-year timeline to cover the listed requirements. We are open to joint Supplier applications.



4. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to Suppliers	WT	25 Apr 2022
2	Submission of Expression of Interest to RFP	Supplier	12 noon (BST) 23 May 2022
3	Submission of Supplier Q&A to Wellcome Contact	Supplier	12 noon (BST) 23 May 2022
4	Advice to Suppliers as to whether they have been invited to submit a full proposal and return of Supplier Q&A to shortlisted Suppliers	WT	27 May 2022
5	Submission of RFP Response	Supplier	12 noon (BST) 17 Jun 2022
6	RFP Evaluation Period (at the end of which Suppliers will be notified whether they are invited to give a presentation)	WT	17 Jun - 29 Jun 2022
7	Supplier Presentations	Supplier	6 - 8 Jul 2022
8	Notification of Contract Award	WT	12 Jul 2022
9	Contract Negotiation	WT & Supplier	13 Jul - mid Aug 2022
10	Contract Start Date	WT & Supplier	Around mid-Aug

5. Response Format

The following headers support the timetable by providing further detail of the key steps.

Expression of Interest (EOI)

Suppliers are asked to submit a short Expression of Interest (max 600 words) by e-mail to Donna James (RFP@wellcome.org) in accordance with the RFP timetable which will contain the following points:

1. Full company name and registration number
2. Registered company address
3. Outline how your previous experience is relevant to delivery of Wellcome's CSID CoP. Please include any relevant experience of engaging stakeholders and/or developers in low- and middle- income settings (max 300 words).



4. Provide a high-level summary of how you would approach building a CSID CoP (max 300 words).
5. Indication of the intention to submit a proposal as a standalone organisation or as part of a consortium/partnership. If the latter is the case, please indicate names of your potential partners and your rationale for including them.
6. Provide a non-binding cost estimate as a single figure (in GBP), excluding VAT.

EOIs will be assessed according to the below criteria. Successful Suppliers will be invited to submit a full proposal.

Assessment Criteria for EOI	Weighting
Strength of answer to point (4) in relation to requirements set out in RFP Objectives (Section 2)	60%
Strength of answer to point (3) in relation to track record and previous experience in delivering open-source projects with an element of community building and/or community of practice projects.	35%
Strength of answer to point (6) in relation to suitability of the high-level cost estimate	5%

Supplier Q&A

Prior to the submission of your RFP response, Suppliers are provided the opportunity to submit any questions they have. All questions are to be submitted to Donna James (RFP@wellcome.org) by e-mail in accordance with the RFP timetable.

Please note all questions will be collated and anonymised before being passed to the project team. All questions will be answered and shared with all Suppliers who are invited to submit a full proposal. There will be no adverse consequences for any Supplier who doesn't feel the need to use the Supplier Q&A process.

RFP Proposal

Subject to invitation (Section 4 #4), Suppliers are required to submit proposals which respond to the following sections.

RFP Questions

This section requests responses from Suppliers to specific questions in relation to this RFP exercise.

#	Question	Max
1	Outline your methodology for delivering the key activities and objectives of this RFP. In your summary, please make sure to include: <ul style="list-style-type: none">• Stages and timeframes in which you propose to meet our requirements, including developing legal frameworks or agreements, as may be applicable;• How you will develop metrics of success;• Your approach to working closely with the DSH team at Wellcome.	1000 words



2	Provide 1-2 case studies where you have either: i) successfully built a CoP; and/or ii) developed a community around open practices; and/or iii) successfully managed relationships between software developers and policymakers or non-developer experts (e.g. clinicians).	600 words
3	Provided 1-2 case studies where you have worked with open-source software. Please include details about: • Licensing and legal requirements; • Community engagement and outreach.	500 words
4	Please discuss your expectations for project sustainability once this contract has ended. Optionally include projected costings for a 'best case scenario'.	200 words
5	Outline any major risks and challenges you foresee as being associated with open-source software and community building.	600 words
6	Outline your current thoughts on what form of CoP you would build and how you would engage existing communities around this idea.	300 words
7	Provide a cost proposal which details and justifies the proposed costs to meet our requirements, excluding VAT.	400 words
8	Make us aware if you are submitting a proposal as part of a consortium and outline any previous track record in successfully working in partnerships.	200 words
9	Thinking about community engagement: A) Assess whether children (being people under the age of 18 years old) will form part of the community engagement (e.g. as software developers or users) and if so provide an assessment identifying and managing associated safeguarding risks. B) Approach to building an intersectional, inclusive global community. Additionally, make it clear how your code of conduct, if applicable, will be enforced in the mid-to-long term.	400 + 100 words

Proposals will be assessed according to the below criteria. Successful Suppliers will be invited to present their proposal.

Assessment Criteria	Weighting
How well proposal meets specification of requirements	50%
Track record and previous experience in running similar challenges	30%
Value for money and suitability of the budget in relation to the proposal	20%



Supplier Presentations

Subject to invitation (Section 4 #6), Suppliers are invited to present their proposals. Presentations should last 10-15 minutes and will be followed by a 30 min Q&A. Presentations should include:

1. An overview to your proposal including initial thoughts on CoP mechanism;
2. Foreseen risks and challenges with mitigation strategies;
3. Timeline and cost breakdown with justification.

Contract Feedback

This section allows Suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. Contract feedback is to be incorporated into your proposal as an annex and in the following format;

Clause #	Issue	Proposed Solution/Comment

Suppliers submitting proposals as a registered company should review this [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 7 below).

Information Governance

Suppliers are asked to complete the [TPSRA2](#) assessment before the RFP submission deadline for Wellcome to assess how you handle data.

6. About Wellcome

Wellcome supports science to solve urgent health challenges facing everyone. We support researchers, we take on big health challenges, we campaign for better science, and we help everyone get involved with science and health research. We are a politically and financially independent foundation. Find out more about Wellcome and our work: www.wellcome.org.

7. Non-Disclosure and Confidentiality

Prospective Suppliers should be aware that inappropriate publicity could have a serious effect upon Wellcome's business. The information contained within this document or subsequently made available to prospective Suppliers is deemed confidential and must not be disclosed without the prior written consent of Wellcome unless required by law.



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. 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.

10. Funding

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

11. 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.

12. 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.

13. Accessibility

Wellcome is committed to ensuring that our RFP 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 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.

14. Diversity & Inclusion

Embracing [diversity and inclusion](#) is fundamental to delivering our mission to improve health, and we are committed to cultivating a fair and healthy environment for the people who work here and those we work with. As we learn more about barriers that disadvantage certain groups from progressing in our workplace, we will remove them.

Wellcome takes diversity and inclusion seriously, and we want to partner with Suppliers who share our commitment. We may ask you questions related to D&I as part of our RFP processes.

15. Wellcome Contact Details

The single point of contact within this RFP exercise for all communications is:

Name: Donna James

Role: Procurement Officer

Email: RFP@wellcome.org