

PROCUREMENT NOTICE

Name:	Enhancements of MESA II Digital Asset and Data Strategy
Procurement Process :	Request for proposal (RFP)
Office :	Barcelona Institute for Global Health (ISGlobal)
Deadline :	2018-Jan. -21 24:00 (EOD) EST / 06:00 CEST (2018-Jan. -22)
Posted on :	2017-Dec.-20
Development Area :	IT / CONSULTING
Reference Number :	MESAIIT-01
References : Link to MESA website: malariaeradication.org Link to MESA Track: malariaeradication.org/mesa-track Link to MESA Knowledge Hub: malariaeradication.org/knowledge-hub Link to Methodologies & definitions: malariaeradication.org/mesa-track/methodology-definitions Link to Alliance: malariaeradication.org/about/mesa-alliance	
RFP Documents : RFP Notice (this document) Existing Methodology Ideated Collection Strategy Response Instructions	
Overview : <p>MESA Secretariat (herein “Secretariat”) seeks to contract services for the redesign and enhancement of its digital knowledge product(s) and web presence for greater engagement and impact to its audience. The overall solution to be developed will primarily be used as a mechanism to assist the Secretariat to collect and present scientific evidence, subsequently to support monitoring and information sharing of ongoing research activities, and to connect with and inform our audience, inclusive of scientific institutions, funding entities and policymaking and programme partners, and individuals involved in or with interest in the area of malaria eradication. The contracted party (herein “responder”) will both develop a user-centric, process-driven platform with insightful analytics to share such research activities, and strengthen our web presence to act as a knowledge hub for promoting and providing access to relevant publications, resources and news to the malaria community.</p> <p>Selection will be based on a competitive basis and will comply with procurement regulations of ISGlobal as organizational host of the Secretariat. Interested responders are invited to submit a comprehensive proposal (herein “response”) addressing the needs as outlined in this RFP and the <i>Response Instructions</i> document to the Secretariat focal point below¹.</p> <p>Anna Oje Manager, Secretariat Malaria Eradication Scientific Alliance (MESA) ✉ anna.oje@isglobal.org</p>	

¹ Incomplete response shall be disqualified from consideration. Secretariat or ISGlobal will not disclose information regarding responders nor their responses.

Content of this RFP

There are 3 main digital assets related to this RFP: MESA Track, MESA Main Site, and MESA Branding.

MESA Background

The Malaria Eradication Scientific Alliance (MESA) is an inclusive and collaborative consortium of malaria research, policy, and implementation partners dedicated to advancing the science of malaria eradication. First launched in 2012 with the support of the Bill and Melinda Gates Foundation (BMGF), MESA is based on the concept that an optimized, funded, and evolving malaria elimination and eradication research agenda is critical for global eradication. The Alliance is hosted by the Barcelona Institute for Global Health (ISGlobal), and focused on developing innovative, strategic, and evidence-based solutions for countries and regions to eliminate malaria. It is well positioned to implement this comprehensive program by drawing on its multidisciplinary team, a strong network of collaborators, excellent relations with elimination networks, and its role in consolidating and sharing evidence over the years. Its outcomes, outputs and activities are aligned with the World Health Organization (WHO) Global Technical Strategy for Malaria (GTS)² “supporting element” of harnessing innovation and expanding research, as well as with BMGF’s strategic malaria goals. Its activities are grounded by the objective of accelerating knowledge within the research community and seek to inform relevant development agendas in 3 ways: knowledge curation, knowledge translation, knowledge amplification.

MESA recently concluded its Phase I programme period. As it seeks to move onto Phase II (MESA II) and build on its past success in anticipation of increased engagement from the scientific and programme community at-large with renewed ambition by the WHO towards elimination, an update of its digital toolset and web presence is planned.

MESA Track: Tool for Knowledge Curation and Translation

With the renewed call to eradicate malaria in 2007, and publications of the malaria eradication research agenda (maERA) to follow in 2011, and recently updated in 2017³, it became increasingly important to manage information and emerging evidence in a manner responsive to eradication strategies, and informative to the policy-making process. The malaria community lacked then and still requires the tools to know *who is doing what where*: to understand the activities in scientific landscape, investments made, expected outputs, how activities relate to the maERA agenda and its recommendation / gaps identified, and overall how evidence can be translated into policy and programme action. Under its first BMGF grant (2011-2017), Phase I of MESA (MESA I) addressed this need by creating *MESA Track*⁴, an open, online tool that provides a platform to collect, and presents a consolidated view of, ongoing research relevant to malaria elimination and eradication dating from 2011.

Information carefully curated onto the tool has proven to be informative to policies and practices across a broad range of needs within the community at-large. Examples of thematic portfolios include: Ivermectin⁵, Attractive Toxic Sugar Baits⁶, and P. Knowlesi⁷. Examples of institutional portfolios include: Ifakara Health Institute⁸, Harvard T.H. Chan School of Public Health⁹, President's Malaria Initiative¹⁰.

² Refer to WHO Global Malaria Programme and its GTS: www.who.int/malaria/about_us/en/

³ www.malariaeradication.org/updates/new-research-agenda-malaria-elimination-and-global-eradication

⁴ *MESA Track*: www.malariaeradication.org/mesa-track

⁵ <http://www.malariaeradication.org/mesa-track/advanced-search?keywords=ivermectin>

⁶ <http://www.malariaeradication.org/mesa-track/advanced-search?keywords=trap>

⁷ <http://www.malariaeradication.org/mesa-track/advanced-search?keywords=knowlesi>

⁸ <http://www.malariaeradication.org/mesa-track/ifakara-health-institute-ih>

⁹ <http://www.malariaeradication.org/mesa-track/harvard-th-chan-school-public-health>

¹⁰ <http://www.malariaeradication.org/mesa-track/presidents-malaria-initiative-pmi>

MESA Track: Proposed Layout and Analytics Views

Conceptually, *MESA Track* could be laid out with the following areas (from aggregated views to individual projects):

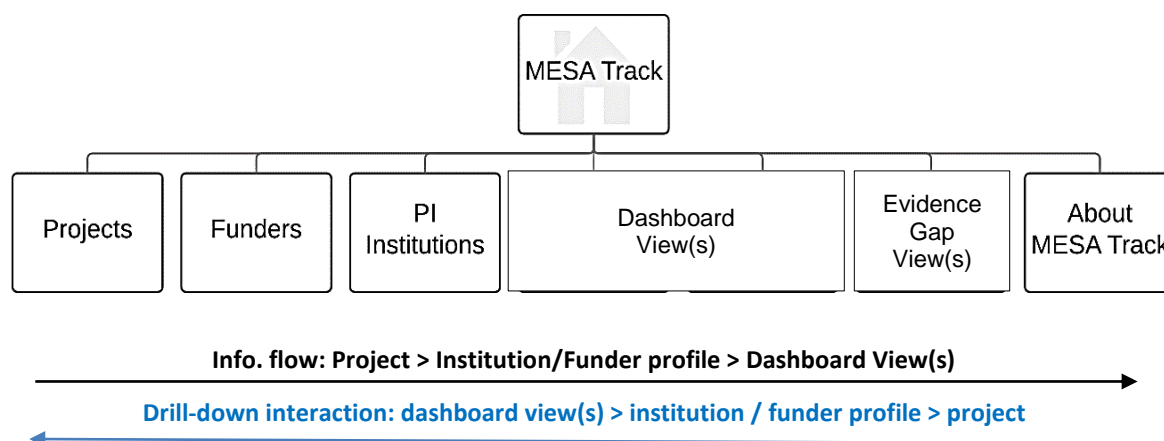
- Several interactive views visualizing projects captured within *MESA Track*, dimensionalized by country, funder, year, institution, research theme and method (associated to projects), or can be sliced by a keyword search (e.g. ivermectin). View is “drillable” to slice across dimensions and allows dynamic linking to institution, funder, list of projects, etc.
- A searchable view showcasing each institution whose projects are captured within *MESA Track*, including the funders who supported it, funding amount received (over time, over theme), and other media / ext. info e.g. bio
- A searchable view showcasing funders captured in *MESA Track*, and similar metrics such as institution profile
- A searchable project directory.

Searchability should be enhanced from the existing version of *MESA Track* to cater to greater need of user inquiry. It should include all existing functionalities and the following:

- Flexible search focus on specific dimensions / attributes: e.g. searching the term “MDA” within either or both project *Title* and *Abstract* fields
- Case insensitive or sensitive option, smart option (e.g. MDA = M.D.A. or m.d.a. or mda)
- Filter on projects based on specific metric measure: e.g. projects (or institution with totaled contribution) less than specific funding amount, or within a range of amount.
- Filter on projects across time horizon e.g. less than, greater than, within range of years
- Filter on projects / institutions by update status or timestamp e.g. less 3 months, etc.
- The concept of “search” as it applies to users interacting with the dashboard view that leads to a filtered down list of projects or institutions i.e. drillability as mentioned above

As a priority strategic area for MESA, we will look to first pilot theme-based dashboard view(s) on Operations Research. However, this will depend on completeness of data and if it is highly customized or built as a standard dynamic dashboard aggregated from project data.

The following depicts an overall public site layout and the conceptualized flow (level of aggregation) as follow:



The Secretariat stipulates that dashboard view(s) be covered under a creative commons license or another open-data standard, and user-generated results after interactive analysis can be exportable (downloadable) for consumption offline. Bonus if individualized shareable links can also be generated per result views to be shared by the user or Secretariat communication or across social media channels, and if programmable feed (API / RSS) is available with filter conditions defined by database users, e.g. extracting data only on projects in North Africa from BMGF.

MESA Track: A Word on Evidence Gap View(s) / Gap Track

As MESA's ultimate mission is to synthesize and understand current evidence-generating activities and confidently inform partners and policymakers on the gaps in activities or investment focus, it is vital to have a more systematic way to visualize said gaps. These views might require more customization / bespoke than aggregated analytics views, as how to categorize areas where gaps may exist may be different from one research area / theme to another. One reference frame to be used e.g. is using an output of the WHO ERG on that particular topic where the expert group had analysed evidence and concluded / recommended areas of need in a greater research focus.

We therefore would like to create a visual representation of *MESA Track's* data to visualise the research landscape to improve navigation and identification of investment or research activity gaps. An example can be found at the following link: <http://gapmaps.3ieimpact.org/>. The chosen responder will provide consult on, develop, pilot and launch a suitable way of presenting our data for this analysis and any associated technical constraints. We will need a high-level presentation(s) with the ability for users to filter or drill down into the detail of the evidence being presented, perhaps on a theme-by-theme basis.

MESA Track: Data Collection Mechanism

The current way information on research activities is being collected is inefficient, as it heavily relies on an initial web search, and screening of data from various public sources and a heavy handshaking method between the focal point of an institution, or the primary researcher leading the investigation to validate or correct the data we compiled. Additionally, there is no existing staging area online for MESA to preview the data with the contact person before publication which led to 2 workaround approaches:

1. Publish as-is then change as it goes based on researcher / institution feedback,
2. Assemble all data first on a document template, share with contact to edit / comment, then finally upload and publish onto *Track* once all information is validated.

This does not fit well with our ambition forward to increase our coverage on curating activities and effective use of human resource. Refer to the **"Existing Methodology"** supplementary document for background.

In its enhancement, MESA envisions two procedures towards collection of project data:

1. User approach that shall be more meticulous and target area (theme) driven
2. A (or a set of) ETL procedures for casting a wider net to collecting and screening research activities

Refer to the **"Ideated Collection Strategy"** supplementary document for conceptualized approaches by MESA. Responders are expected to advise for / against proposed approaches based on strategic challenge / advantage, technological feasibility and greater details in their functional design, or suggest an alternative setup with the same objective of addressing any limitations.

MESA Track: Data Organization

The following is a suggested data library for *Track* drawing from existing attributes recorded for the project and institution / funder data. Responders should further recommend any additional data that might be of value to our strategy and work.

Project data <ul style="list-style-type: none"> - Title - Abstract - Date(s) - Countr(ies) (<i>dimension</i>) - P. Investigator - Institution (<i>dimension</i>) - Funding Source (Funder) - \$\$ (USD) - Partner(s) (= Institution / funder) - Relevant links / materials - Verified? Badge (<i>dimension</i>) - (other attributes) - Keyword tags (for search and aggr. on themes) (<i>dimension</i>) - Theme: 1 or N? - Method: 1 or N? - Active/inactive? (<i>dimension</i>) - ... 	Principle Investigator <ul style="list-style-type: none"> Name Picture Institution (<i>dimension</i>) Bio. List of projects: active / finished? Metric: Total \$ (aggr. from projects) + over time? Ext. Link(s): researchgate, academic page? Institution <ul style="list-style-type: none"> Name (<i>dimension</i>) Bio. Metric: Countr(ies) of projects (aggr. from projects funded) List of Themes? (to highlight: research specialties) Metric: Total \$ (aggr. from projects) by funder / theme? Ext. Link(s)? List of projects Funder <ul style="list-style-type: none"> Name (<i>dimension</i>) Bio Metric: Countr(ies) of projects (from list of projects tied) Metric: Total \$ distributed over time / over theme / country / institution?
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Responders should also address what is the best strategy for standardizing the categorization of projects according to the themes, methods, or other research types. Currently MESA employs a subjective approach to assigning one or multiple themes to a project. MESA looks to responders to recommend an approach that allows for more consistent / structured strategy to categorization and ongoing management of definitions and other master data. Other desirable rules / advisory from responders to be considered in design are e.g. no hard deletion / replacement of historic data (soft update), and accounting for real-world scenarios for when a leading researcher transitions from one institution to another and how the projects should reflect such a change (e.g. historic / inactive or completed projects should continue be to linked to him/her, whereas ongoing projects can be updated to reflect the new investigator leadership).

MESA Track: Online Presence

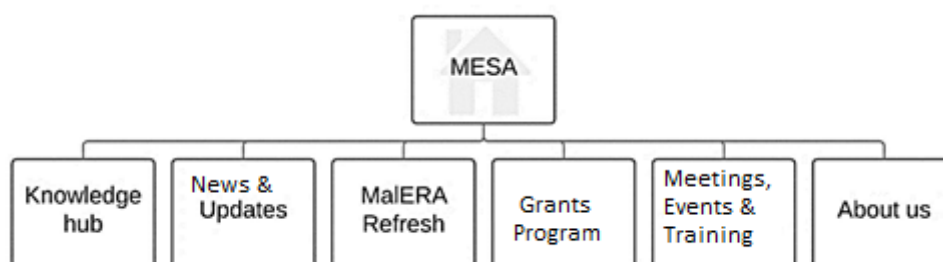
Given the desired enhancement and added analytics toolset aiming to be integrated onto *MESA Track*, we are conceptualizing the separation of it from the home MESA website. The two sites should be visually related, and evidently still accessible to one another either via a simple hyperlink or more sophisticated linkage at a data-level: e.g. a new blog / mentioning a project or institution on the home site be hyperlinked to its corresponding profile / entry on *Track*. Responders shall provide advice on this separation given the choice of tool(s) to be used on *Track* and its "integrability" to the home site.

MESA Main Site: Display and Functionality Enhancement

The MESA website was designed and built in Drupal in 2014. Since, the site has grown organically, resulting in some sections receiving significant traffic on the front and back ends, while other areas haven't been updated since they were first published when the site went live. Now that we are embarking on MESA II, we want to renew our web presence to reflect our current priorities and strategic direction, while still making a space to highlight our past activities (i.e. grants program), even if they are no longer active.

As the MESA Alliance continues to grow, an increase in community engagement is expected and with it, traffic on the MESA website. As such it will be important to have a flexible design structure and leave room for future growth as MESA reacts to changing needs of the malaria community.

A proposed layout of the main site is as follows:



The main site will have either static or dynamic linkage to *Track*. Responders are expected to help visualize further its layout / wireframe. Responders are also expected to make technology choices where the MESA Secretariat can have authority to edit / change / create content, and to do so with ease of use.

Essential requirements for the MESA website redesign:

- The site must be responsive (suitable for PC and on all devices)
- Modification to the architecture and content of the site
 - More functional and interactive home page
 - Redesigned Knowledge Hub*
 - Update to the look and feel, also according to any changes to MESA branding (see below)
- Robust searchability across the site
- Flexibility in adding and removing pages, and ease of general web maintenance for autonomy of the Secretariat in upkeep, and future growth of the website

*One particular area to be re-developed is the MESA Knowledge Hub (KH)¹¹, an online library of (mainly) unpublished resources relevant to malaria elimination. The current design is a collection of links to resources, distinguished by their format (report, multimedia, global resource, etc), and searchable by several tags, such as theme, country, institution, etc. However, the richness of the materials available in KH is hidden by the appearance of long lists of links.

We envisage the following overhaul to the KH:

- New visual presentation of the resources (such as thumbnail images of report cover or video)
- Interactive multimedia section similar to a YouTube channel
- Robust searchability: We require the ability to search by topic/theme, person, institution, etc. which also searches across resource title, and tags.
- When a project in *MESA Track* has an output, we would like to be able to link this to the resource in the KH, and vice versa.
- Like the projects in *MESA Track*, each resource is given a “tag” to categorize it by theme, and we request advice on the categorization strategy.

¹¹ www.malariaeradication.org/knowledge-hub

MESA Site: Reporting

Responders should account for providing site traffic insight (Google analytics, etc.) for MESA to regularly assess how the site is being used by its visitors.

As a potential add-on, we would be interested in learning about Search Engine Optimization options.

MESA Branding

MESA has had two iterations of its logo. The latest design was released in 2014 in conjunction with the launch of the MESA website, when we began to gain visibility. Since, MESA has developed a strong brand and is recognized in the community, however, our materials are simple. We now require a style guide, brand book, or manual of guidelines on following marketing assets: Logo, Color Schemes, Business Card Layouts, PowerPoint Template, eNewsletter Template, Letterhead, etc. We also require a separate logo for *MESA Track*, with a brand manual to differentiate and compliment the brand guidelines of MESA.

Piloting, User Input, Maintenance, Bonus

We wish to engage with our audience to receive feedback as a means of improving the interface, usability and functionality and garnering genuine interest in our tools for public use and site for a source of information. During the development process of these 3 main areas there will be opportunities at workshops and malaria meetings, such as MIM2018 (April 2018, Senegal) or World Malaria Congress (July 2018, Australia) to test the features and functionality of any prototypes with current and potential users to gather feedback. Responders are expected to propose a high-level workplan that will detail how we may meet these iterative deadlines.

In addition, responders should keep in mind in their solution maintenance options after reaching the end of the development phase, with preference given to an approach where MESA has high autonomy to edit / change / update without heavy service dependency or where Responders will include training to ensure MESA is knowledgeable to perform upkeeps / changes to content or structural design / layout of the site and *Track*.

MESA would additionally appreciate / consider any support and partnership that Responders can help establish as part of this public goods development effort aligned to certain organization / foundations' missions.

EXISTING METHODOLOGY

This document outlines the approach to collecting project information.

Overall Inclusion/Exclusion Criteria

The following summaries overall MESA approach to determine whether to include a research project.

Project Inclusion/exclusion Criteria ¹²	
✓	✗
Projects pertinent to elimination / eradication agenda	Literature reviews
Active in 2012 and onwards	Other publications
Core investments / large structural grants	

Scenarios and Methodologies

There are in general 2 major scenarios where interest or new effort of curating projects on TRACK may be required: **Landscape Analysis**, and **Institutional Profiling**. Consider however in both cases that actual approach or exercise of data collection is similar: **manual web search, screen, prepare entries, verify with institutional contact or PI, and publish**. Refer to any research project for each piece of information collected: <http://www.malariaeradication.org/mesa-track/advanced-search>

Landscape Analysis

In Landscape Analysis, specific topic / theme (e.g. *Plasmodium Knowlesi*, a parasite) is predetermined to which project information needs to be collected usually due to a greater objective in-mind e.g. compiling the project portfolio to create a synthesis of existing evidence for use in policy discussion or recommendation development by WHO. Examples of past landscape analysis/portfolios include:

- [Portfolio for the WHO Evidence Review Group \(ERG\)¹³ on *Plasmodium knowlesi*](#)
- [Portfolio for IVCC on Attractive Toxic Sugar Baits \(ATSB\)](#)
- [Ivermectin for malaria transmission control](#)

The approach to collect is as follow:

Step 1: Search terms are defined, reviewed and agreed to search for projects (in its title, abstract, other preliminary published content, or as determined belonging to such theme / topic).

Step 2: Systematically pull information on research led by institutions. Some public sources (research grant-giving / cosponsoring organizations) consulted are as follow. This reference list varies based on analysis to be done and knowing where institution / funder may already choose to specialize in particular theme(s):

- Bill and Melinda Gates Foundation
- clinicaltrials.gov
- Congressionally Directed Medical Research Programmes
- Department For International Development
- Europe PMC Grant Finder
- European Union Research and Innovation
- Foundation for Science and Technology, Portugal
- Grand Challenges
- Grand Challenges Canada
- grantome.com
- Wellcome Trust
- Medical Research Council of the United Kingdom
- Ministry of Health of Brazil
- National Health and Medical Research Council of Australia
- National Institutes of Health
- National Science Foundation
- President's Malaria Initiative
- Research Council of Norway
- Swiss National Science Foundation
- Thrasher Research Fund
- UNITAID
- USAID

We also search on sites of research institutions and other sources e.g. ASTMH annual meeting abstracts¹⁴ and European Congress on Tropical Medicine and International Health abstracts.

¹² Methodology & definitions, <http://www.malariaeradication.org/mesa-track/methodology-definitions>

¹³ <http://www.who.int/malaria/mpac/mpac-mar2017-plasmodium-knowlesi-presentation.pdf?ua=1>

¹⁴ <http://www.astmh.org/annual-meeting/past-meetings>

Step 3: With preliminary data compiled, drafted projects are entered and published onto Track*. (*this is due to current limitation that there is no staging area for contacts to go online to verify).

Step 4: We then contact the principal investigator of each research project with link to the corresponding MESA Track entry, inviting her/her to validate information and fill in any gap by sending us comments on requested change(s).

Step 5 (optional): In some cases, pending on how much further to probe or decision to increase effort / scope, we contact additional experts e.g. WHO ERG members, focal person(s) at institutions, etc. and provide them firstly with the link on Track to portfolio (i.e. list of entries filtered by selected search term correlating to the theme-in-question of analysis) to present what is currently captured. We may then follow our correspondence with a word / document template asking them to complete in case they are involved in additional project not to our knowledge or not recorded in our exercise (Step 2-4).

Institutional Profiling

Institutional Profiling pertains to routine check-in / update of research activities and assembly of an area profiling its activities of a particular institution. This has a secondary purpose of creating a voluntary recognition as an "affiliate" with MESA. Examples of current institutions portfolios created:

- [Harvard T.H. Chan School of Public Health](#)
- [Ifakara Health Institute](#)
- [Deployed Warfighter Protection Program](#)
- [Manhiça Health Research Centre](#)

The approach to collect is as follow:

Step 1: Contact focal person at institution soliciting interest in creating/updating their portfolio in Track.

Step 2: Create a document with all the institution's projects compiled in MESA Track enabling them to change / update any data + search for additional information on the institution's website.

Step 3: Provide a template of the information we collect in MESA Track to our partner and ask him or her to add the additional projects.

Step 4: Ask focal contact to provide a summary of malaria elimination strategy of the institution for its profile area on Track and solicit permission to use their logo.

Step 5: When we receive the template with new projects, we upload them into MESA Track and get back to our contact with the link to updated / new portfolio. This last step is reflected also by updating the "Consultation Date" on top of its profile.

RESPONSE INSTRUCTIONS

Response Criteria

In response to this RFP, the MESA Secretariat is looking for a consultative approach to guide us and potential QA member(s) through a design-thinking lifecycle and product validation process led by responders to ultimately obtain the right digital assets fitted to MESA's strategy in serving our malaria scientific, funding and policy community. Responses are to include:

Essential:

- A well-developed proposal addressing the 3 (three) major digital asset areas: MESA Track, MESA main site, and MESA Branding
- Milestone and deliverable-based work-plan outlining high-level activities involved.
- Milestone and deliverable-based budget breakdown and proposed payment term(s)
- Project team structure with role(s) and technical expertise(s) of each member
- Description of responders' background to establish eligibility to bid and perform work incl. e.g. relevant information of registered establishment of venture or on company incorporation
- Responders' experience in global health digital product design and development
- Technology to be used: software, hardware, standards, programmatic interface, languages, etc.
- Engagement dependency: net new licensing, service subcontracting, site hosting term(s), etc.

Optional / Complementing:

- Highlight any knowledge product or training service for developing user knowledge and ongoing maintenance capacity of toolset(s) by Secretariat
- Highlight experience or approach responders may take to help secure proposed or additional resource benefiting the response e.g. acquisition of free or cost-reduced licensing scheme from software vendor(s) as part of their offering from their foundation(s) or CSR programme(s), solicitation of free or cost-reduced data science expertise from nonprofit consulting entit(ies), and / or funding support from technology-focused funding organization(s).

Please submit all response materials in one consolidated document file in PDF format.

Evaluation Approach by MESA

Responders will expect the Secretariat to take an objective competition-based evaluation approach to assess all responses that shall be complete and submitted on time with all essential requirements listed above fulfilled. Key evaluation criteria include but are not limited to:

- Proposal meeting both our technological and strategic needs
- Comprehensiveness of proposed development approach
- Level of user intuitiveness and self-maintenance in proposed design
- Technical experience of responders' venture and team to be assigned for development
- Cost-effectiveness incl. of technology-related expense, manpower, other resource requirements
- Timeliness of work plan in meeting our requirements for piloting MESA Track (or its components) at key meetings in 2018 (MIM, April, Senegal; World Malaria Congress, July, Australia)

MESA Secretariat will evaluate all responses and provide feedback to all regarding outcome. Responders need not inquire about decision status.

RFP Contact

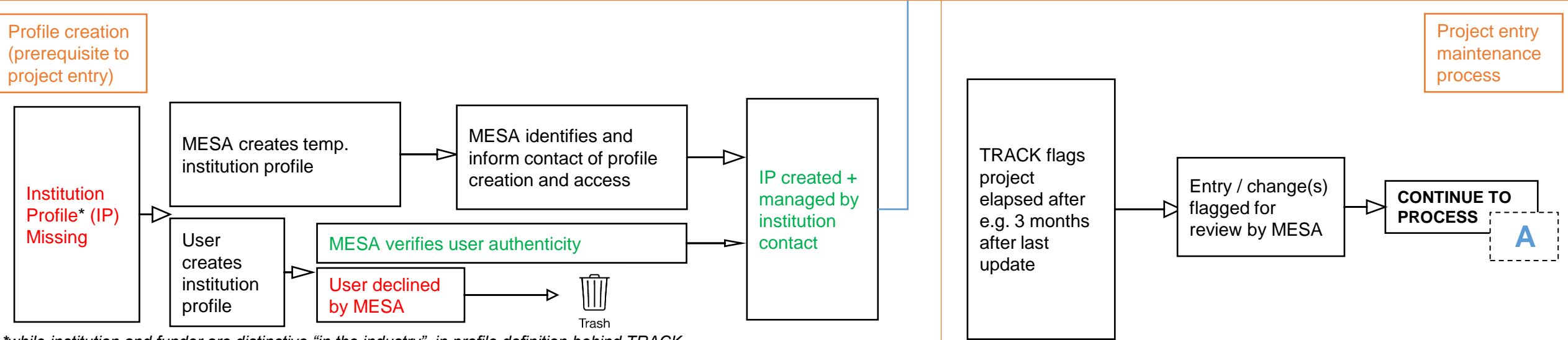
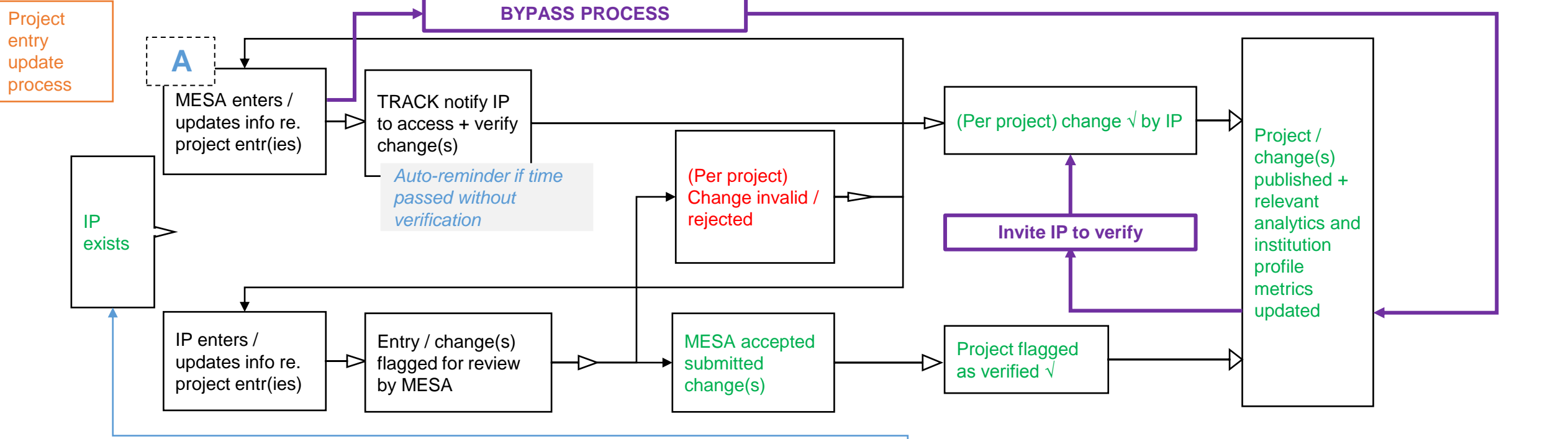
Anna Oje
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Malaria Eradication Scientific Alliance (MESA)
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IDEATED COLLECTION STRATEGY

1. User approach to create profile and manage entries*
2. Programmable procedures for routine screening and pull of public (or warehoused) data*

**Refer to “Existing Methodology” supplementary document for a sample of list of common organizations MESA checks for / pulls research activity data.*

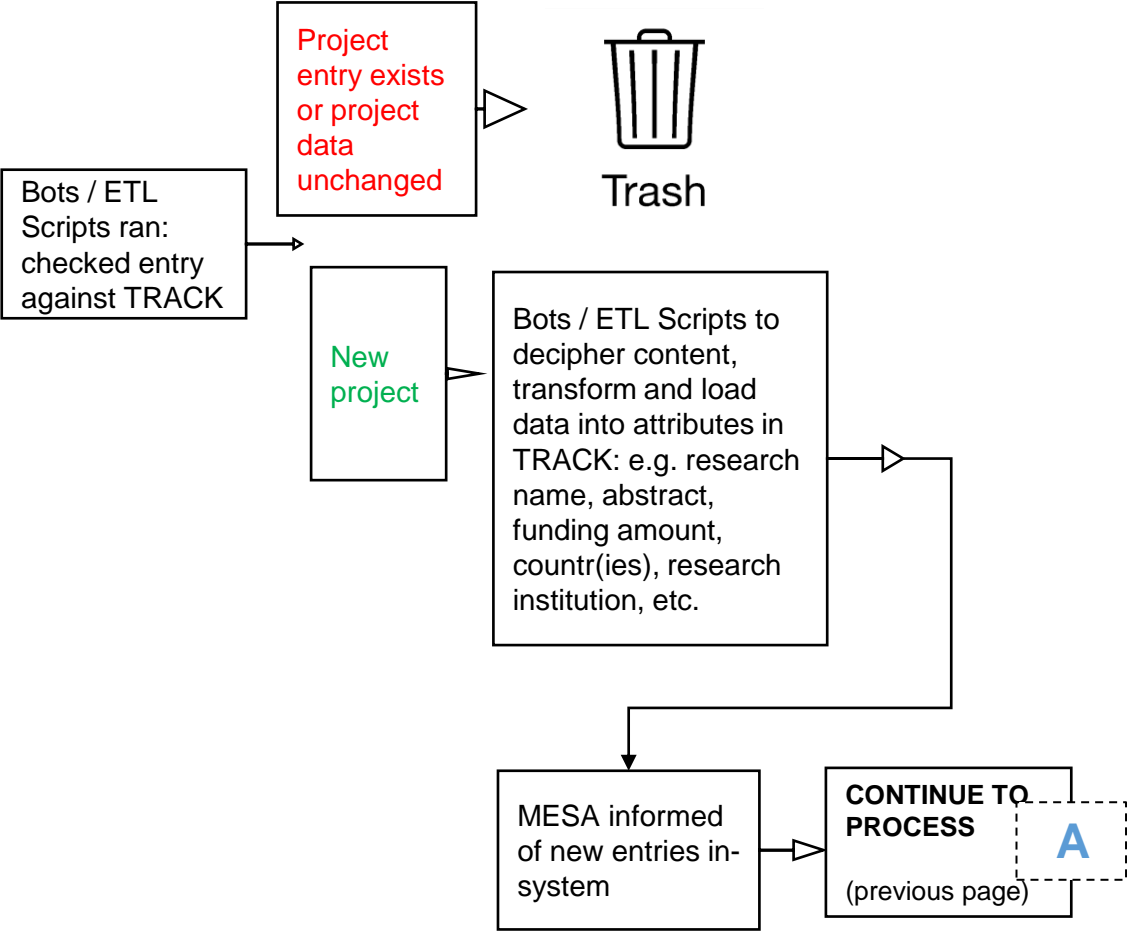
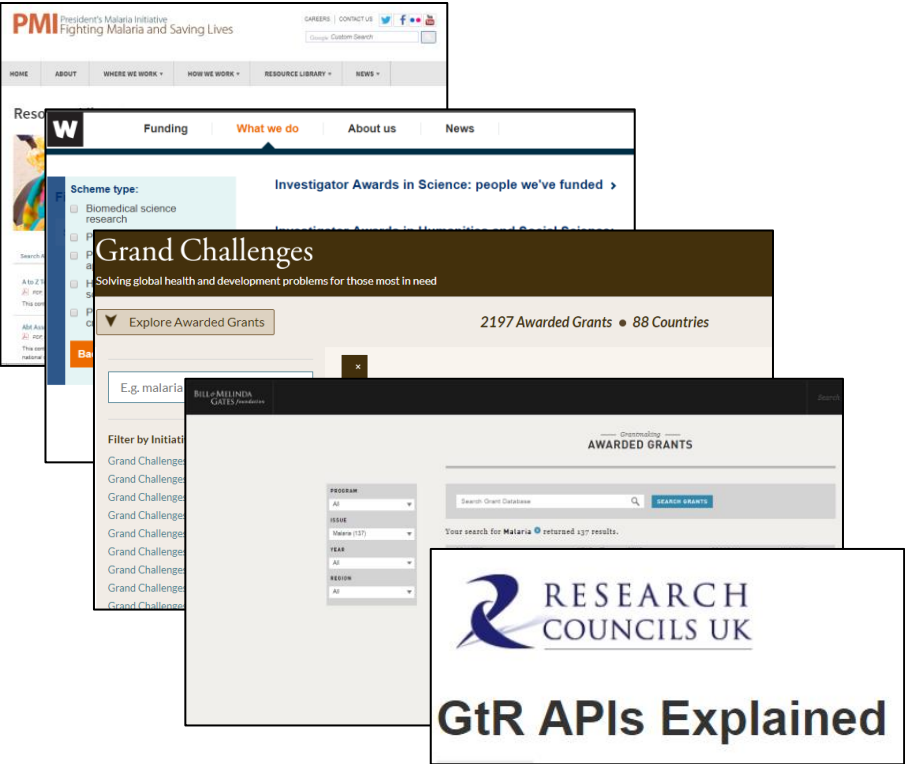
1. User approach to create profile and manage entries



*while institution and funder are distinctive “in the industry”, in profile definition behind TRACK they may be considered the same for contact management purpose.

2. Programmable procedures for routine screening and pull of public (or warehoused) data

SITE / WEBSERVICE (API) Sourcing or DATABASE Links



**MESA understands this may required more structured agreement to each grant organization / research institution to establish direct link to their database and terms of use and will facilitate the engagement if this approach deemed better in terms of dataflow / maintenance long-term.*