

# BELMONT FORUM

Call for Expressions of Interest (EOI)  
to host the  
Belmont Forum Secretariat

Release date: 5 April 2017  
EOIs to be received no later than 17h00 EDT 5 July 2017

## ***The call***

The Belmont Forum seeks a host organization for its Secretariat. The Belmont Forum and its Secretariat seek to develop a host agreement with an organization capable of providing professional services to a multi-national entity. The host agreement document will be negotiated between the Belmont Forum Steering Committee, the Secretariat Director and Deputy Director, and the host's representatives, detailing the services that the host will provide, including any caps or minima on these services, any associated indirect costs, and a copy of accounting or labor laws that would apply to personnel working on site at the host institution or remotely.

## ***The background***

The Belmont Forum is a partnership of organizations committed to the Belmont Forum Challenge:

*To support international transdisciplinary research providing knowledge for understanding, mitigating, and adapting to global environmental change.*

Currently, the Belmont Forum has approved membership for 25 scientific organizations and ministries on six continents representing more than 50 countries. It also counts 6 partner organizations – GEO, ICSU, ISSC, IIASA, START and USGCRP.

The Forum's primary activities are Collaborative Research Actions (CRAs). These international calls for proposals bring together both Belmont Forum member and non-member organizations in a central peer review process to identify multi-national interdisciplinary and transdisciplinary projects for support. Collaborative Research Actions to date have focused on such themes as Coastal Vulnerability, Freshwater Security, Food Security and Land Use Change, Biodiversity and Ecosystem Services,

Arctic Observing and Science for Sustainability, Mountains as Sentinels of Change, and Climate Predictability and Inter-Regional Linkages.

The Forum is also supportive of and has adopted an open data policy and principles to increase transparency, accessibility and interoperability of information to inform responses to global environmental change and to aid the reproducibility of scientific results. The e-Infrastructure and Data Management Initiative coordinates actions in support of the Belmont Forum Open Data Policy, including coordination, planning, use cases on barriers to open data sharing, capacity building and training.

The Belmont Forum Secretariat supports the Forum members in implementing action, growing the Forum membership, administering Forum business, ensuring governance and policy compliance, and communicating with interested researchers, stakeholders, and organizations. The Secretariat reports four times a year to a Steering Committee which includes two co-chairs that advance Forum business in between annual plenary meetings. The Secretariat and Steering Committee solicit feedback from the full membership outside the plenary when actions related to governance or member/partnership are involved.

The Secretariat also has bi-weekly contact with the e-Infrastructure and Data Management Initiative's leadership and Communication, Collaboration, and Coordination Office (C3O) to maintain connectivity between the membership and the implementation of the open data policy and coordinate joint activities to grow support for the policy worldwide.

The Forum approved 25 organizations for membership in the last plenary meeting, representing more than 50 countries on six continents. In addition there are 6 partner organizations working collaboratively with the Forum. Members contribute either annual dues to the Secretariat or provide in-kind support through personnel secondments. The Secretariat currently consists of an Executive Director and Deputy Director, a Communications Director, and between 6-8 part-time seconded personnel who telework from their home institutions. While the Forum operates globally, the working language of the Forum is English.

The Forum has contributed significantly to research on scientific and societal grand challenges. The 7 CRA competitions which have completed the award process have expended more than 50 million euros of support to project teams and leveraged additional resources from already-funded programs. Awarded projects connect researchers and stakeholders on all six continents, in more than 35 countries.

Project outcomes advance not only academic understanding of complex systems but also work with stakeholders to inform and shape policy, provide potential solutions, and empower community networks to extend the life of these projects far beyond the award timeline. While awards are made by the partner institutions themselves, the Secretariat supports the process end-to-end, including the development of

valorization and synthesis activities, drafting of outreach documents, communication through our website, newsletter, and social media, and strategic partnering in legacy actions.

The flexible framework of Belmont Forum's virtual funding pot has attracted the attention of numerous organizations looking to support grand challenges of sustainability science. As interest in the Forum, its approach, and project outcomes increases, the need for a professional, responsive host organization becomes critical.

### ***Secretariat host requirements***

The Belmont Forum requires a host organization to house and provide administrative services to support the Secretariat and Forum business for this growing global science partnership. Requirements and recommendations outlined below reflect best practices for international organizations similar in size and mandate to the Belmont Forum as well as experience to date from the first years of Secretariat operation.

The host organization must be scientifically interested in global change science.

Due to the potential for on-site in-person meetings, there is a requirement for access to shared meeting facilities for groups up to 40 persons. It is recommended but not required to have on-site or proximate access to other meeting facilities that could potentially host larger meetings (> 100 people). A history of hosting similar meetings would be an advantage. Easy access to international transportation, including an international airport, would be an advantage.

The Forum requires office space for two personnel: the Executive Director and Deputy Director. The potential to grow and have access to additional office space is welcomed.

The office space must be furnished, including desks, chairs, at least 2 dedicated international phone lines with voicemail and teleconferencing capabilities, high-speed internet, and support for proper working conditions.

The Belmont Forum operates using tele- and video-conferencing as much as possible for efficiency and energy saving. The host will support this by also providing access to either shared or reasonably priced telecommunications services and support for day-to-day operation, such as high speed broadband internet, IT support and security. It is strongly suggested but not required that the host permit the use of Skype or other VOIP on premises for call and videoconferencing.

The Forum should receive support from personnel within the host organization for accounting, travel, IT, and other support services.

Full accounting services are required from the host with transparent monthly reporting to the Secretariat, including account balances, expenditures, and incoming transfers. The host should be able to provide or assist the Forum in obtaining tax-free status to ensure maximum availability of Forum member dues. The Forum's accounting will be required to be kept on a separate ledger from the host institution in case of independent audit.

The host must have the ability to receive and transfer monies from our international member organizations via wire transfer or other method to a Belmont Forum account, with possible sub-accounts for individual members.

The Secretariat requires account authority over Belmont Forum funds for expenditures including but not limited to the travel of Secretariat staff, contracting for services, personnel costs, and event support. The Secretariat requires streamlined travel support, including booking of official travel using either an in-house or commercial travel agent.

The Forum requires advance notification, prior written estimate, and clear invoicing for in-house services that are not provided as part of the host agreement.

The compensation and benefits packages for in-house Belmont Forum personnel will be negotiated by the Belmont Forum, including tax-exemptions for in-house personnel, pension contributions, and social security contributions.

Additional provisions such as vacation, etc, will be negotiated between the host institution and the Belmont Forum.

It is recommended but not required that in-house Belmont Forum Secretariat personnel be afforded diplomatic status.

The Forum requires that the host have the ability to support freedom of movement and freedom of moving personal effects of Belmont Forum in-house personnel, including duty-free transport of employees' personal effects to and from the duty station, responsive support for work and residence visas, housing authorization or in-country account set-up as required, and communication to the Belmont Forum of any particular restrictions that might affect hiring of specific nationalities.

It is highly recommended that the host location have convenient access to international K-12 schools, mass transport or parking, high quality medical care and hospitals, and embassies or consulates for visa and passport renewals, and assistance for visitors attending meetings as needed.

It is required that any host organization applying to this Expression of Interest would enter into the host-hostee agreement with a reasonable expectation of permanence, with evaluation of the agreement every 3-5 years.

### ***Review criteria and process***

Applications will be submitted via the Expression of Interest template to [contact@belmontforum.org](mailto:contact@belmontforum.org) no later than 17h00 EDT on July 5, 2017 with a subject line: Secretariat Host EOI. A confirmation e-mail will be sent to the submitter's e-mail address once received.

Any questions about the Expression of Interest template or process should be directed to [contact@belmontforum.org](mailto:contact@belmontforum.org) with a subject line: Secretariat Host Query.

All complete applications will be reviewed by the Belmont Forum Steering Committee, Secretariat Director and Deputy Director for adherence to the requirements as outlined above. Conflicts of interest will be addressed to ensure the neutral review of all Expressions of Interest. If the review committee has any questions about specific offerings or arrangements, they may be in contact with the host lead identified in the Expression of Interest.

Final host candidates will be contacted by the review committee for a phone interview in September 2017. Selection will be announced via the Belmont Forum website no later than October 2017.