

PRO-STEP Project

Call for Tenders: Moderation of the EPF PRO-STEP Final Conference

PRO-STEP Final Conference (BRUSSELS, BELGIUM)

13 July 2017

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2. EPF – General and Background Information

The **European Patients' Forum (EPF)** was founded in 2003 to ensure that the patients' community drives policies and programmes that affect patients' lives to bring changes empowering them to be equal citizens in the EU.

EPF currently represents 74 members, which are national coalitions of patients' organisations and disease-specific patient organisations working at European level. EPF reflects the voice of an estimated 150 million patients affected by various chronic diseases throughout Europe.

EPF's vision for the future is that all patients with chronic and/or lifelong conditions in the EU have access to high quality, patient-centred equitable health and social care.

The present call for tenders refers to the PRO-STEP project and its closing Conference in October 2017.

For more information, please visit our website: www.eu-patient.eu

3. Description of the PRO-STEP project & Final Conference

3.1 DESCRIPTION OF PRO-STEP PROJECT

The PRO-STEP project - Pilot project on Promoting Self-management for Chronic Diseases in the EU - SANTE/2015/D2/021-SI2.722481- is an EU funded tender study that focuses on self-management in chronic conditions, its impact and added-value for the sustainability of healthcare systems including cost-benefits analysis, as well as enablers and barriers.

The Project is undertaking research in five key areas when discussing self-management for chronic conditions – **Policies** (assessing policies on national and local levels) – **Barriers** (identifying any barriers that may hinder development of self-care) – **Communication Tools** (evaluating healthcare communication tools which aim to improve patients/consumers condition management) – **Innovation** (undertaking a literature review in order to obtain more insight into the concept of innovation in health) and – finally **Future Scenarios** (identify driving forces, opportunities and dangers for policy development which a focus on stakeholder engagement to ensure effective future policy).

Additional details about the PRO-STEP project are available [here](#).

3.1.1 PROJECT TIMELINE

PRO-STEP project Start	15 th January 2016
PRO-STEP project End	14 th January 2018
PRO-STEP project Interim Report	September 2017
PRO-STEP Final Conference	23 rd & 24 th October 2017
PRO-STEP Final Report	January 2018

3.1.2 PROJECT OBJECTIVES

In brief, the objectives of the PRO-STEP project are:

- Identification of good practices and the possibility to scale up these initiatives and disseminate them successfully across other healthcare systems;
- Analysis of added-value in terms of cost-benefits;
- Proposals for possible methods for promoting self-care, taking into account previous and ongoing work in the field.

3.1.3 EXPECTED OUTCOMES OF THE PROJECT

- Production of an extensive literature review;
- Analysis of self-management initiatives in a number of disease-areas;
- Developing a platform of experts in self-care in chronic conditions;
- Identification of barriers to promotion of self-care;
- Guidelines for policymakers at local/national levels;
- Innovative approaches and policy scenarios for European action.

3.2 FINAL CONFERENCE: RATIONALE, AUDIENCE, VENUE AND LOGISTICS

The purpose of the Conference is to share the outcomes of the PRO-STEP project and to contribute to the definition of a set of recommendations on self-management in chronic conditions.

Furthermore, the Final Conference aims:

1. To bring together relevant stakeholders to raise awareness of the PRO-STEP project, its outputs and results;
2. To explore specific issues, such as barriers, opportunities and needs of different stakeholders, EU Member States in the implementation of effective self-management strategies;
3. To collectively reflect on follow up actions needed to promote self-management in Europe.

The Conference will take place on the 23rd and 24th of October 2017 at:

Pullman Hotel, Brussels Centre Midi,
Place Victor Horta 1,
1060 Brussels, Belgium

The language of the Conference will be English. The Conference will start with registration and opening lunch (12:30 – 14:00) on the 23rd and will end on the following day, with concluding remarks and closing lunch at 13:00. For further information, see preliminary agenda in point 3.5.

3.3 TARGET GROUPS

The conference aims to gather at least 100 participants, representing a balanced breakdown of different stakeholder groups and at the same time various geographical regions.

The audience will include representatives of:

1. National patients' organisations from European countries;
2. Patient representatives in the selected disease areas (a balanced geographic and disease representation split);
3. Health professionals, including doctors, nurses, pharmacists, health managers and other professionals relevant for promoting self-care generally and in the selected diseases;
4. Payers, e.g. national health insurance organisations;
5. Member States' policy-makers at national /regional levels;
6. EU-level decision-makers (European Commission relevant DGs, European Parliament);
7. Industry and commercial actors, e.g. pharmaceutical, MedTech, ICT industry;
8. Representatives from the Steering group for Promotion and Prevention;
9. Representatives from the European Health Parliament will be approached and invited as well.

3.4 EXPECTED OUTCOMES

Through addressing the specific objectives mentioned above the PRO-STEP Final Conference aims to achieve the following:

- Make a valuable contribution towards fostering self-management in chronic diseases initiatives across Europe;
- Stronger knowledge of self-management in chronic diseases policies among European, national and subnational stakeholders;
- Better understanding of barriers and challenges, exchanged knowledge deriving from the five working groups' experiences.

3.5 PRELIMINARY AGENDA

Please be aware agenda is a work in progress and might change **significantly**. For latest update on the agenda, please contact Mr. Lyudmil Ninov at lyudmil.ninov@eu-patient.eu

Day I

12:30-14:00	Registration and welcome lunch
14:00-14:45	Setting the Scene (Three speakers)
14:45-15:45	Panel discussion (Two speakers)
15:45-16:15	Coffee Break

16:15 -17:15	Breakout sessions (<i>Three speakers</i>)
17:15-18:00	Report back and wrap up (<i>One speaker</i>)
	Concluding Remarks (<i>One speaker</i>)
Day II	
9:00-9:30	Key note opening (<i>One Speaker</i>)
9:30-10:30	Panel discussion I (<i>Two speakers</i>)
10:30-11:00	Coffee Break
11:00-12:00	Panel discussion II (<i>Three speakers</i>)
12:00-12:30	Report back (<i>One speaker</i>)
13:00-14:00	Closing networking lunch

3.6 TASKS AND DELIVERABLES FOR THE FINAL CONFERENCE

The purpose of this call for tender is to select a moderator who will provide the service of facilitation during the two half-days of this EPF event.

Generally speaking, the role of the Facilitator/Moderator will include co-ordination and moderation of the total number of sessions and together with the relevant/assigned EPF Staff members determination/development of the Conference structure, acting as moderator and reporting back to EPF after the end of the Conference.

The successful tenderer shall deliver the following deliverables based on these tasks:

General tasks include, but are not limited to:

- To facilitate the sessions to ensure all participants' needs are met, to give structure to the exchanges and to help manage timekeeping;
- To develop a mechanism to collect and collate the learning and reflections of participants through a brief feedback meeting/teleconference with members of EPF after the Event;
- To encourage full participation of all attendees enabling the exchange of information and collaboration between them, and finding synergies and outcomes from the discussions;
- To ensure the interactions and exchanges are linked to the strategic objectives of EPF objectives.

4. Description of services in detail

The successful tenderer will provide high-quality services in the field of moderation/facilitation of the above described conference. In the addition to the general tasks, the following tasks need to be carried out:

Before the event:

- Meeting with EPF team to go over the agenda and expected outcomes;
- Assisting in the preparation of panel discussion and breakout sessions (agreeing a methodology with the EPF team);
- Preparatory work with the speakers and panellists: this will be done via conference call(s) and a member of EPF will be presented as well;
- Preparing dynamic interactions with the audience and stimulating and inspiring Q&A sessions;
- Preparing innovative introduction of the speakers;
- Preparing thought-provoking, dynamic and interesting panel discussions;

During the event:

- Chairing the plenary sessions;
- Introduction of the speakers;
- Chairing the panel discussions;
- Facilitating the interaction with the audience and encouraging participants to give input;
- Facilitating the Q&A sessions;

After the event:

- As mentioned above, a brief feedback meeting between the Facilitator/Moderator and the EPF Staff members is envisioned.

5. Volume of contract

The maximum contract price is EUR 4000,00 including fees, administrative overheads and VAT.

The duration of the assignment is around 2 months. The minimum total number of days for the service is 35 working days.

Any costs linked to the execution of the tasks/deliverables will have to be covered by the selected tenderer, for example such as travel costs to and from the venue/EPF premises. However, EPF will provide meals and refreshments on the days of the Conference.

6. Participation in the tendering procedure

6.1 TENDER SUBMISSION FORM

Tenderers should submit the following documents:

- Tender submission form (See template in Annex I);
- Curriculum Vitae (4 pages maximum);
- Tender applications must be sent to Ms. Valentina Strammiello, EPF Programme Manager at valentina.strammiello@eu-patient.eu and in copy (CC) to Mr. Lyudmil Ninov, EPF Project Officer at lyudmil.ninov@eu-patient.eu

6.2 TENDER PROCESS

EPF reserves the right to conduct the tender process and select the successful tender. EPF is not bound contractually or in any way to a bidder to this request for tender until EPF and the successful winner have entered into a written contract.

6.3 TENDER EVALUATION AND SELECTION

Participation in this tendering procedure is open on equal terms to all natural and legal persons fulfilling the abovementioned eligibility criteria and language requirements. EPF may, in its discretion, extend the closing date and time of the tender.

The selection procedure will be based on the principles of equal treatment, fairness and transparency and on first three quality criteria (75%) and price (25%).

All applicants will receive acknowledgement of receipt of their tender and will be informed of the outcomes of the selection process within maximum 10 days following the deadline date. EPF is not obliged to provide reasons for its decision to shortlist; accept or reject any particular tender.

Offers to the tender will be evaluated based on the following criteria:

Qualitative award criteria and awarding points		
Qualitative criteria 1:	Understanding of the nature and purpose of this service by being familiar with EPF's work and also having experience with managing conferences discussing chronic conditions in the recent years.	25 points
Qualitative criteria 2:	A list of references – quality of the technical and professional capacity proposed by the tenderer in terms of moderating EU events. The tenderer is requested to provide at least 3 examples of events already moderated.	25 points

Qualitative criteria 3:	Innovation – the tenderer will demonstrate in the proposal innovative techniques for facilitation of events, including panel debates, question and answer sessions and moderation of workshops.	25 points
Qualitative criteria 4:	A cost proposal – most economically advantageous tender for a maximum budget of EUR 4000,00 VAT inclusive.	25 points

Applicants must have excellent knowledge of English language.

6.4 EXCLUSION CRITERIA

Candidates or tenderers shall be excluded from participation in this procurement procedure if:

- a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- c) they have been guilty of grave professional misconduct proven by any means which the EPF can justify;
- d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the EPF or those of the country where the contract is to be performed;
- e) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Union's financial interests;
- f) following another procurement procedure or grant award procedure financed by the Union's budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

6.5 TENDER AND ASSIGNMENT SCHEDULE

The assignment shall start as from the date of signature of both contracting parties and shall be completed by 17th November 2017.

Tender submission and schedule of the work are as follows:

Launch Tender	EPF	19.07.2017
Close of the Tender	Tenderer	19.08.2017
Selection of the Tenderer	EPF	07.09.2017

Teleconference discussion /EPF Project Manager to agree on the objectives, the methodology, and the process with the selected tenderer.	EPF – Tenderer	11.09.2017
Signature of the Contract /EPF’s Director of Operations & Engagement to sign the agreement on one hand and the selected tenderer on the hand.	EPF - Tenderer	15.09.2017
Start of assignment	Tenderer	18.09.2017
End of assignment	Tenderer	17.11.2017

7. Terms of payment

Prices must be fixed amounts in Euro and will not be subject to revision. The amount of VAT should be shown separately on the invoice.

Costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.

8. Quality issues

In delivering the service the tenderer shall ensure the highest quality standards of which EPF shall be the sole judge.

9. Confidentiality and conflict of interest

The Tenderer undertakes that they will not at any time, either before or after the termination of this service, use or disclose or communicate to any person confidential information relating to the affairs of EPF. This restriction shall continue to apply after the termination of the service without limit in point of time.

To ensure the independence of terms of their contract, the winning tenderer will sign a declaration certifying that they have no conflict of interests in relation to the tasks to be undertaken and undertake to inform Camille Bulot, EPF’s Director of Operations & Engagement should this status change.

10. Terms and conditions

EPF reserve the right to reject any and all proposals, in whole or in part, to advertise for new proposals, to abandon the need for services, and to cancel or amend this call for tender at any time prior to the execution of the written contract. EPF reserves the right to waive any formalities in the call for tender process. EPF may respond to questions or provide information from tenderers, and is under no obligation to provide such responses or information to all other tenderers.

By submitting a proposal, the tenderer agrees that:

- * EPF may copy the proposal for purposes of facilitating the evaluation of the proposal and agrees that such copying will not violate the rights of any third party.
- * It will not bring any claim or have any cause of action against EPF based in any misunderstanding concerning the information provided or concerning EPF's failure, neglect or otherwise, to provide the bidder with pertinent information as intended by this call for tender.

The accomplishment of a tendering procedure imposes no obligation on the EPF to award the contract. Should the invitation to tender cover several items or lots, EPF reserves the right to award a contract for only some of them. EPF shall not be liable for any compensation with respect to tenderers whose tenders have not been accepted. Nor shall it be so liable if it decides not to award the contract.

11. Contracting authority

European Patients' Forum (EPF)

Chaussée d'Etterbeek 180

1040 – Brussels

Belgium

12. Contact Person

Ms. Valentina Strammiello, EPF Project Manager at valentina.strammiello@eu-patient.eu

Mr. Lyudmil Ninov, EPF Project Officer at lyudmil.ninov@eu-patient.eu