

Call for Tender

Summer Training Course for Young Patient Advocates – Leadership Programme 2019

1. 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 72 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 across 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 tender refers to the delivery of the third edition of the Summer Training Course for Young Patient Advocates – Leadership Programme.

Young patients have an important place in EPF work. EPF aims to empower young patients to strengthen their confidence and express their voices in order to be treated on an equal footing with others. We promote better cooperation between younger and adult patients, and greater partnership between young patients, their families and carers, and the wider community. In this way, we encourage young patients to take active role in development of policies and programmes at the EU level.

In 2012, EPF has established the EPF Youth Group (YG) and developed Youth Strategy to address these issues in a systematic and organized manner. Since then, the YG organizes meetings and engages in youth projects to share first-hand experiences and good practices with young patients from all over the EU/Europe. They continuously work to raise awareness about the challenges young patients face in their daily lives and advocate with policy-makers and stakeholders. Nevertheless, it is evident that

young patients have to become more aware of their rights and to exercise those in accessing health care system as well as all other spheres of their life.

In order to build on our work, the present document refers to the organisation of the third Summer Training Course for Young Patient Advocates - Leadership Programme (Summer Training Course) for young patients advocates. As such, the Leadership Programme intersects with all EPF thematic, namely patients' empowerment, patients' involvement, sustainable patient organisations and non-discrimination.

Our vision is to create a platform where young patients' advocates would empower, inspire and learn from each other. We aim to gather young patients and/or their representatives from different organisations and different countries. They will discuss and explore common issues relevant for young patients and patients' movement across Europe and in this way, they will maximize their advocacy impact within their respective countries. The Summer Training Course is organized on an annual basis and designed according to the emerging needs of EPF.

The theme for this year's event will be dedicated to investigating how patient advocacy is evolving and facing emerging challenges and opportunities while keeping a **strong ethical approach**. Patient involvement in healthcare systems and in the R&D medicines lifecycle provide tremendous opportunities to have patients' voices heard and their input embedded in the design of services. Young patients' voices are increasingly heard by regulatory bodies such as EMA, industry, HTA bodies, and policy makers, to ensure that their perspective is not missed to inform the decision-making process. As usual, these opportunities raise questions around the **representativeness** of those bringing the patient perspective, their potential conflict of interest or risk of bias depending on the role patient advocates play in which context. EPF believes that in its evolution patient advocacy must build strong safeguards to avoid pitfalls and misperceptions. **Transparency** is acknowledged as an absolute precondition to advocacy¹, therefore it applies also when it comes to involving young patients either as individuals or as young patient communities in advocacy work. There is an identified need to keep building and nurturing a culture of "**ethical advocacy**" and **trust** to facilitate constructive interactions within and outside patient communities.

During the Summer Training Course participants will gain insight into the complexity of this issue and address it through interactive debates, group exercises and concrete action follow-up plans. If you would like to know more about the first and the second edition of the EPF Summer Training Course please visit our [website](#).

2. Purpose and Nature of the Leadership Programme

The purpose and nature of the Programme is to support, through high-quality training and coaching, young patient advocates or representatives of young patient advocates who have the motivation to learn more about patient advocacy and maximise their leadership potentials in real environment settings.

¹ European Patients' Forum, *Transparency Guidelines*, 2017 <http://www.eu-patient.eu/globalassets/library/toolkits/epf-transparency-guidelines.pdf>

Specifically, the Programme targets around 40 (forty) young patient advocates (ages 18 – 30) from EU Members States and European countries who have either the EU official candidate or potential candidate countries status, representing:

- Employee or volunteer of a patient organisation
- Patient with a chronic and/or lifelong illness/condition who is affiliated with a patient organisation
- Patient with a chronic and/or lifelong illness/condition who is not affiliated with a patient organisation

Overall aim of the Summer Training Course 2019: To contribute in building and strengthening the patient advocacy capacities of young patients and related youth groups and transfer their acquired knowledge and values to their respective constituencies.

Specific objectives:

- To strengthen participants’ strategic advocacy skills;
- To inspire young patients to engage in patient advocacy in a transparent and ethical manner;
- To foster participants’ future engagement in public awareness and advocacy efforts in their respective countries;
- To establish guidelines and principles for cooperating with other stakeholders.

Summer Training Course Process Indicators:

- The rate of received applications per gender and per country as an indicator of the interest in taking part in this type of event;
- The percentage of the total number of selected participants who is taking part in the assessment prior to the Summer Training Course;
- The percentage of the total number of “returning” participants that is applying for the Summer Training Course;
- The level of participants’ involvement into the debates and group interactions before, during and after the face-to-face event in Vienna, Austria;
- The level of participants’ satisfaction with the Summer Training Course i.e. the relevance of the topics and the adequacy of received materials;
- The proportion of the target group completing the full Training (no drop-outs).

Summer Training Course Output Indicators:

By the end of the Summer Training Course, the following outputs will be available:

- The increased level of knowledge about the key concepts covered by the Summer Training Course as measured by pre and post assessments;
- A group statement on the evolution of patient advocacy with a focus on representativeness, ethics and transparency;
- At least one advocacy strategy and action plan developed that address the most critical aspects such as conflict of interest;

- Development of a comprehensive individual follow-up plans (small projects) to transfer the acquired knowledge to the respective communities
- At least 3 examples of good practices and lessons learnt which EPF could potentially promote/ scale up in the upcoming years;
- List of topics dedicated for the next edition of the Summer Training Course in 2020;
- A comprehensive post-event report done by the Tenderer and approved by EPF.

Following the Summer Training Course 2019:

- Trainees will transfer and facilitate the uptake of their learning to local patient communities;
- Trainees will be able to use their learning to engage into public awareness and advocacy actions in their respective countries;
- Tools and recommendations developed by and with trainees will be integrated in the work of their organisations;
- Trainees will acquire awareness, knowledge and expertise of representativeness, transparency and ethical principles and how they can be applied in their day-to-day advocacy/professional activities.

Summer Training Course Short-term Outcome Indicators:

Immediately after the completion of the Summer Training Course, an evaluation will be put in place in order to measure:

- The extent to which participants perceive that the Summer Training Course helped them to build self-confidence and increase level of self-esteem
- The extent to which participants perceive that the Summer Training Course helped them to boost self-power and enhance their leadership potentials
- The extent to which participants perceive that the Summer Training Course helped them to increase their sense of purpose to act as patients' advocates
- The extent to which participants perceive that the Summer Training Course helped them to build social and cultural competencies with other participants
- The extent to which participants perceive that the Summer Training Course helped them to feel resourceful to become involved into work of their organisations
- The extent to which participants perceive that the Summer Training Course helped them to recognise discriminatory practices and to be able to speak up for one's rights
- The extent to which participants perceive that the Summer Training Course helped them to feel empowered to make positive changes in their environments

Summer Training Course Medium-term Outcomes/Impact Indicators:

Following a period of 3 months of individual coaching and remote support, an evaluation will be conducted to measure:

- The degree to which participants' individual follow-up plans are being successfully implemented

- The degree to which participants' recommendations about the involvement of young patients are included in the work of their organisations
- The degree to which participants engage into public awareness and advocacy campaigns in their respective countries
- The degree to which participants involve in EPF's thematic working group and contribute with their views and opinions
- The extent to which the Leadership Programme leads to a visible improvement of young patients' issues as a result of their advocacy efforts

2.1 Methodology

The following section provides an overview of the main components of this Programme and will be used as a basis for development of a detailed training methodology by the tenderers as part of their tender bid and will be further defined and agreed upon discussions with EPF.

The proposed methodology has been tested out and validated in previous training modules. It consists of four phases: 1). baseline assessment and warm-up; 2). face-to-face 3-day training; 3). coaching and follow-up with participants; and 4). final feedback and completion of the Summer Training Course.

Assessment

An assessment will allow the tenderers/trainers to establish a baseline of knowledge, attitudes, beliefs, or skills prior to the start of the Programme in order to design the training and develop the training resources accordingly.

Summer Training Course

The programme of the Summer Training Course will be delivered in English. Following the feedback and building on the 2017 and 2018 editions' outcomes, the Summer Training Course will keep the duration of **three full days** the following section provides an overview of main components of the Programme and will be used as a basis for development of a detailed training methodology and programme/agenda. The **selected trainers, EPF and the EPF Youth Group** will be the three contributors to the design, execution and implementation of the Training.

PROGRAMME:

A. Preliminary virtual meetings:

Two months before the face-to-face meeting in Vienna, Austria participants will be gathered on a virtual platform to get to know each other and connect with trainers. Preliminary information about the training topics will be shared and participants will be actively engaged.

B. Tentative structure of the face-to-face meeting:

Tenderers may suggest a different structure and methodology for the face-to-face meeting. Here we indicate a tentative structure.

Taking inspiration from testimonials and real-life experiences, the Training Course will kick off with a

role play showing the different paths a patient advocate can take, which experiences or interactions may enable or obstacle new potential collaborations.

Module I: Representativeness of Patient Advocacy

Module One will offer the opportunity to debate around **representativeness** in the field of patient advocacy. Trainers and participants will look at the broader ecosystem and how patient advocates may navigate and contribute to the decision-making in the health system. The dimensions that will be considered entail European and national level, formal and informal patient groups and individual patient advocates.

Module II: Transparency and Ethics in Advocacy

Module Two will be around **transparency** and **ethics** and how they can be approached by youth groups, patient organisations, informal communities and individual patients. Potential challenges around conflict of interest will be analysed and participants will have the opportunity to practice how they can play an essential role in patient advocacy and avoid misperceptions from the public, respecting well-established good practices and at the same time having an impact at societal level in their local communities.

Suggested methodology: speaker(s), interactive debates, case studies, individual/per country action plans and creation of a supporting toolkit.

Training Course Follow-up

In this phase the trainers will split participants in teams. Each team will be led or co-led by members of the EPF Youth Group. Trainers will provide teams with both collective and individual guidance and support, in terms of their potential leadership capacities and/or specific advocacy issues they may have. At the end of the Programme, trainers will organise a final closing virtual event (October 2019) and nominate the group that has most advanced on the tasks and integrated the learnings of the training course. The results of the winning group will be presented in the context of the EPF Congress in November 2019. This follow-up phase will also help the organisation committee to gather best practice cases and to provide the recommendations for the 2020 edition of the Summer Training Course for Young Patient Advocates.

Evaluation

In line with the output and short-term indicators, as stated above, the internal evaluation should be proposed and led by the tenderers/trainers. The tenderers should provide detailed explanations and evidence on how they will meet these requirements.

As a result of the evaluation and recommendations, the organisation committee will identify these: 1). target groups; 2). training topics and/or 3). training methodology that should be sustained on an annual basis. This will allow the organization committee to design a plan for the next year's Summer Training Course in 2020 in a relevant and customized manner.

The final evaluation may be conducted either by EPF or External Evaluators at the end of the follow-up phase to measure the successes of the medium-term outcomes/indicators.

2.3 Tasks and Deliverables

The training methodology shall take into consideration the different natures of participants who take part in the Summer Training Course, namely their general and professional background, current level of knowledge and further aspirations to develop their leadership potentials. The proposed methodology should reflect these differences. The proposed training will also attempt to strike a balance between theoretical frameworks and the practical aspects through the follow-up phase.

The successful tenderers/trainers shall deliver following deliverables based on the following tasks:

Task	Task Description	Days	Deliverables Description	Estimated Due Date
T1	<ul style="list-style-type: none"> - Review selected participants' applications i.e. their motivation, knowledge and skills in relation to patients' advocacy, their intentions in terms of applying acquired knowledge; understanding of representativeness, transparency and relations with industry/other relevant stakeholders, etc. - Conduct the assessment of participants' knowledge on what ethical advocacy is 	7 days	A report which summarizes applicants' motivations, interests and expectations, together with a set of recommendations in order to tailor the Training Course content and the training follow-up phase.	30 days after the signing the contract
T2	Develop a comprehensive training plan for the Training Course in Vienna, in line with the Leadership Programme outputs	3 days	A training plan that outlines learning objectives for each training topic/session as per EPF rough training design plan, including exercises plan, and outputs.	60 days after the signing the contract
T3	Following the approval of the training plan by EPF, develop pre and post-tests,	5 days	A set of training materials ready for the	

	presentations, handouts, training materials, evaluation questionnaires and other needed materials for participants		use during the training course in Vienna	By the end of June 2019
T4	Deliver the Training Course and moderate sessions with the external speakers (if envisioned) in Vienna	3 days	A comprehensive reporting on the Training Course. Interim report. Can be done in a form of a call as well.	7 – 10 July 2019
T5	Follow-up by means of mentoring/advices/working together with participants to implement their advocacy “projects” (approximately 1h-2h per participant)	10 days	Monthly progress report including an outline of a coaching plan, time and support provided, key issues and challenges, recommendations for each participant	On a monthly basis (preferably on 25 th of each month dedicated for the follow-up phase)
T6	Conduct the evaluation, and write recommendations for the Leadership Programme 2020	2 days	A final event report, including the evaluation findings and recommendations	15 days before the end of contract
In total days: 30 days				

All deliverables should be submitted in English language.

2.4. Timeframe

This section of the call for tender outlines the proposed timeframe for this contract assuming the contract be signed by end of February 2019.

You can find the timeline of the Summer Training Course 2019 below:

Suggested Implementation Period	Activity
By the end of February 2019	<ul style="list-style-type: none"> Set-up the Planning Committee and develop a detailed action plan with checkpoints End of application period for participants
March 2019	Selection of participants by participant selection

	committee and notification to successful applicants
March to June 2019	Preparatory work with trainers (logistics, content and agenda)
7th – 10th July 2019	The Training Course event
August – October 2019	<ul style="list-style-type: none"> • Follow-up with participants • Review of evaluation, recommendations and next steps
End of October 2019	Closing Celebration Event with participants (Online)
End of November 2019	Final Training Course Report

3. Volume of contract

The maximum contract price is EUR 12.000 (twelve thousand euros) including fees, administrative overheads and VAT.

The total duration of the assignment is around 8-9 months with the flexible worktime schedule. The minimum total number of days for the service is 30.

Travel and subsistence costs linked to travel will be covered in addition to the above-mentioned value according to EPF Travel and Reimbursement Policy.

4. Participation in the tendering procedure

4.1 TENDER SUBMISSION FORM

Tenderers should submit the following documents:

- Tender submission form (Template in Annex I)
- CV/s of people involved in implementing the Task
- The offer should be submitted to Lyudmil Ninov, EPF Project Officer, lyudmil.ninov@eu-patient.eu and Valentina Strammiello, EPF Senior Programme Manager at valentina.strammiello@eu-patient.eu

4.2 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.

4.3 TENDER EVALUATION

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 work plan & 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 (100 points)		
Qualitative Criterion 1:	Relevance of the training experience and expertise of the proposed team to the Youth, Leadership & Patient Advocacy contexts, including their assigned roles	25 points
Qualitative Criterion 2:	Understanding of the nature and purpose of this service in terms of young patient advocacy in the current EU healthcare framework, patient advocacy, transparency and ethics	25 points
Qualitative Criterion 3:	Relevance, feasibility and quality of the detailed methodology proposed, including the work plan	25 points
Criterion 4:	Financial offer – price	25 points

Applicants must have excellent knowledge of the English language.

4.4 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 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 EU financial interests;
- f) following another procurement procedure or grant award procedure financed by the EU budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

4.5 CALL FOR TENDER SCHEDULE

The assignment shall start as from the date of signature of both contracting parties and shall be completed by end of November 2019, at the very latest.

Tender submission and schedule of the work are as follows:

Launch Tender	EPF	23.01.2019
Close of the Tender	Tenderer	23.02.2019
Selection of the Tenderer	EPF	25.02.2019
Briefing meeting/Signature of the Contract	EPF - Tenderer	25-28.02.2019
Work kicks off	EPF - Tenderer	01.03.2019
Closure of Tender 2019	EPF - Tenderer	15.11.2019

5. 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.

6. Quality issues

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

7. 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

undertakes to inform Mrs. Valentina Strammiello, EPF Senior Programme Manager should this status change.

8. Terms and conditions

EPF reserves 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.

9. Contracting authority

European Patients' Forum (EPF)
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www.eu-patient.eu