

Call for tender: Ensuring the Future of EUPATI (EFOEUPATI)– EUPATI Patient Education and Engagement Portal

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1. EFOEUPATI – Ensuring the Future of EUPATI

The [European Patients' Academy on Therapeutic Innovation \(EUPATI\)](#) was funded by the Innovative Medicines Initiative in the period February 2012 to January 2017 (known as well as IMI-EUPATI Project 2012-2017). It aimed to trigger a **major rethink in the way patients and the public understand the medicines development process and their own involvement therein**. Armed with a deeper understanding, **patient experts and advocates will be empowered** to work effectively with the relevant authorities, healthcare professionals and industry to influence the medicines development process for the benefit of patients.

[Ensuring the Future of EUPATI \(EFOEUPATI\)](#) is a project funded under the Innovative Medicines Initiative 2 (IMI2), grant agreement number 806995. The project will run from 1 September 2018 until 31 August 2020 and it aims to ensure **optimal exploitation and sustainability of the core achievements of the IMI-EUPATI Project 2012-2017**: Patient Expert Training Course, the multilingual public Toolbox, and the EUPATI National Platforms Network (ENP). It is imperative that these pillars exist in the medium- and long-term to address the growing field of patient engagement. The project is co-lead by the European Patients' Forum (EPF) and Bayer.

One of the objectives of the project is to **create a Patient Education and Engagement Portal that will host relevant information and resources for patients and other stakeholders to ensure meaningful and value adding patient engagement in medicines R&D**. This will end up replacing the existing EUPATI website www.eupati.eu which focuses on the delivery of the Patient Engagement Toolbox, ensuring it meets the future needs of the Patients' Academy.

2. EPF – General 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 **70+ members**, which are **national coalitions of patient's organisations and disease-specific European platforms**. 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**.

3. Purpose of the Tender

The purpose of this call is to **invite tenders for the contract of web developer/service provider** that will **design and develop a Patient Education and Engagement Portal**, based on the user, functional, and data management requirements attached to this call (please see [section 5 – Requirements](#)).

The portal **will provide information on the involvement of patients in medicines research and development processes, and support all stakeholders in these activities, including providing an infrastructure for Alumni of the EUPATI Patients Expert Course to collaborate with each other and third-parties**. The site will provide reusable educational information, and resources as well as tools, guidance and standards developed by existing and future and initiatives for the patient community and the stakeholders with whom they interact.

The **EUPATI.eu** Patient Education and Engagement Portal will enable users (patients, industry and academia) to:

- **Identify what training material, educational content, tools, templates, guidance, etc are available to increase their effectiveness and add value during their involvement in the medicines research and development process;**
- **Identify synergies and opportunities for collaboration** with different stakeholders;
- **Provide resources and connections in an innovative, reusable, and multilingual way** to enable wider and more effective engagement.

The **EFOEUPATI team will work with the web developer throughout the design and development phase to ensure all individual sections of the portal match the requirement specified**. Strict quality checkpoints, including ethical review of the design of the system and its data management, will be enforced to ensure that pre-defined requirements are achieved.

Once the portal is populated with content representative of the full site, **user testing will be conducted with volunteers from the EUPATI consortium, EUPATI National Platforms, and the EUPATI network**, to assess whether the site meets the user requirements. Timely user testing will ensure that any remedial action can be taken with the developer to ensure that the requirements are met. After the completion of user testing, the site will be populated with all remaining content and additional users performing administrative and moderation roles will be trained before a seamless transition from the existing EUPATI websites to the new Patient Education and Engagement Portal. The completed portal will be validated against the requirements, including any changes that were made throughout the process.

4. Description of Services

The following tasks will need to be carried out:

- **Design and develop a Patient Education and Engagement Portal** based on the user, functional, and data management requirements attached to this call (see [section 5](#));
- Take in consideration the different **use cases in the design phase of the portal** (patient community and industry, regulators, National Platforms, etc.);
- **Test the new Portal** with different users (EUPATI Alumni, ENPs, EUPATI Consortium, New users, etc.);
- **Launch of the Patient Education and Engagement Portal;**
- **Migrate the different existing EUPATI sites to the Portal** (Toolbox - eupati.eu, Training Course - edu.eupati.eu, ENPs - e.g.ch.eupati.eu, etc.).

5. Requirements of the Portal

Applicants should consider the requirements attached to this Call for Tender in their proposals. The requirements table includes information on the functionality, user profiles, and other elements that the EUPATI.eu Portal should provide.

5.1 CURRENT SYSTEMS

EUPATI currently uses a number of systems to achieve its aims, and often enjoys NGO status for licenses.

The EUPATI Toolbox/website (www.eupati.eu) and ENP subsites (e.g. <https://ch.eupati.eu/>) are currently hosted on Wordpress. Multilingual functionality is implemented using WordPress plugins. The EUPATI Patient Expert Course is hosted on a Moodle learning management system (<https://edu.eupati.eu>). Transactional emails are dealt with in Sendinblue. Internal EUPATI work takes place on a combination of Box.com, Bitrix, and Office365.

6. Participation in the Tendering Procedure

6.1 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.

6.2 DOCUMENTS TO BE SUBMITTED

The tender proposals should include:

- **An outline of the approach that will be taken to establishing and delivering the project;**
- **Details of the individuals** who will lead, manage and deliver the project and details of their experience, formal qualification and knowledge in web development/design;
- **Detailed costs;**

- **Timetable and quality gates** for the project;
- Applicants should include **background material to demonstrate the previous experience** and range of work of the consultant(s) and/or of the specific personnel proposed for the work; This can include descriptions and examples of previous relevant work;
- **Proposal for data management** to ensuring compliance with all relevant legislation;
- Tenders should also include **contact details of two referees**.

Document applications must be sent by **8th February 2019, 23:59 CET**. Please contact Camilla Habre (camilla.habre@eu-patient.eu) if there are any queries regarding the call.

Closing Date for acceptance of application is 8th February 2019, 23:59 (CET)

Applications can be submitted by post to European Patients' Forum, Chaussée d'Etterbeek 180, 1040 Etterbeek, Belgium or by email to camilla.habre@eu-patient.eu. EPF is not responsible for any proposal not received due to technical faults.

6.3 TENDER EVALUATION

Participation in this tendering procedure is open on equal terms to all natural and legal persons fulfilling the above-mentioned eligibility criteria and language requirements. EPF may, at 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 expertise (60%) and price (40%).

All applicants will receive acknowledgement of receipt of their tender and will be informed of the outcomes of the selection process within 30 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:

Criteria	Weighting
Proposed solution to our request based on requirements provided by EPF	40
Credibility and proven expertise in website development	10
Project Planning	5
Proposed Data Management	5
Price	35

Ongoing/maintenance costs of systems implemented	5
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Applicants must have excellent knowledge of the English language.

6.4 EXCLUSION CRITERIA

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

- 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;
- they have been convicted of an offence concerning their professional conduct by a judgment which has the force of *res judicata*;
- they have been guilty of grave professional misconduct proven by any means which the EPF can justify;
- 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;
- 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;
- 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 SCHEDULE

The assignment shall start as from the date of signature of both contracting parties and shall be completed by **August 2020**.

Tender submission and schedule of the work related to Patient Education and Engagement Portal creation:

Launch Tender	<i>EPF</i>	December 2018
Close of the Tender	<i>Applicant</i>	February 2019
Selection of the applicant	<i>EPF</i>	February 2019
Briefing Meeting	<i>EPF and Applicant</i>	February / March 2019

First phase: Design of Patient Education and Engagement Portal	<i>Applicant</i>	August / September 2019
Second phase: User Testing of the Portal	<i>EPF and Applicant</i>	January / February 2020
Third phase: Launch of the Portal	<i>EPF and Applicant</i>	August 2020

7. Contract Price and Terms of Payment

Quotes for performing this Service are invited from interest parties.

All Prices must be fixed amounts in EUR including VAT and will not be subject to revision.

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

8. Quality Issues

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

9. Confidentiality and Conflict of Interest

The successful applicant 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 applicant will sign a declaration certifying that they have no conflict of interests in relation to the tasks to be undertaken and undertake to inform Matthew May, EUPATI Coordinator (matthew.may@eu-patient.eu) should this status change.

All data submitted to EPF will be treated in accordance with Belgian law.

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 applicants and is under no obligation to provide such responses or information to all other applicants.

By submitting a proposal, the applicant 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 applicants whose tenders have not been accepted. Nor shall it be so liable if it decides not to award the contract.

The estimated date for the signature of the contract will be in March 2019.

11. Glossary

EUPATI Toolbox – educational content currently found at www.eupati.eu

EUPATI Fellow – A graduate of the EUPATI Patient Expert Training Course. Also referred to as EUPATI Alumni.

EUPATI Patient Expert Training Course – 15-month blended-learning course hosted on a Moodle learning management system.

EUPATI National Platform – ENP for short. ENPs model the EUPATI construct at a national level and are coordinated centrally. Each ENP has their own website.

12. Contact Person and Contracting Authority

For more information, please contact:

- **Matthew May**, EUPATI Coordinator (matthew.may@eu-patient.eu)
- **Joan Jordan**, EUPATI Content and IT Coordinator (joan@eupati.eu)
- **Camilla Habre**, EPF Project Officer (camilla.habre@eu-patient.eu)

Answers to questions will be sent to the question originator and published on [this website](#).

Contracting Authority:

European Patients' Forum (EPF)

Chaussée d'Etterbeek, 180

1040 Brussels – Belgium

www.eu-patient.eu

BE0807.605.667

Registration Address:

European Patients' Forum a.i.s.b.l

Rue Dicks 14

L-1417 Luxembourg

Number F448

13. Questions and Answers

Question 1: We see that a grant of €362,242.50 was given by the Innovative Medicines Initiative for the project. Can we assume that the majority of this is available for the development of the web portal?

Answer: No, the EFOEUPATI project comprises 4 work packages: Coordination, Sustainability, IT, National Platforms. The redevelopment of the website falls within the remit of the IT work package as one of the major deliverables. The 3 operational work packages are equally resourced.

Question 2: What are the audiences of the EUPATI.eu website?

Answer: There are several audiences: users of the Toolbox (patients, public interested on health, etc), EUPATI Trainees, Network partners (National Platforms, Consortium partners, etc), HTA and regulatory bodies.

Question 3: In your vision of the website, do you see WordPress as the main technology platform or are you interested in any other solutions?

Answer: We have had a good experience with WordPress in the past but are also interested to hear about solutions based on other platforms.

Question 4: Do you intend to create a new Portal within the existing EUPATI.eu website?

Answer: No, we aim to replace the current website and integrate different EUPATI platforms/websites (Toolbox, Moodle, Community Groups, etc) providing a simplified user experience.

Question 5: Do you still want to use Moodle for the EUPATI Training Expert Course?

Answer: We want to continue with Moodle that has gotten more user friendly and GDPR compliant. From an administrative perspective, we are happy with the platform and we do not have interest of changing the technology. Changes to the e-learning platform are outside the scope of this tender.

Question 6: How does the hosting services work with EUPATI.eu?

Answer: Our Moodle system is hosted by HowToMoodle, and our website is hosted with WPEngine.

Question 7: What is the timeframe of the tender?

Answer: The deadline for applications is 8 February 2019. If we receive more than 10 proposals we will work with two-rounds of review. Otherwise we will review all the proposals together based on the criteria selection written on the Call for Tender.

Question 8: How does it work for UK-based companies' proposals in the Brexit context?

Answer: We are accepting proposals from all over the world.