Call for Tenders

Final Evaluation (impact assessment) of the EUPATI Project

1 Purpose and context of contract

The purpose of this tender is to invite applications to perform the **final evaluation of the impact of the EUPATI Project**.

The objective of this task is to gather evidence on the impact generated by the project against the objectives and key performance indicators set out in the description of work. This assignment will complement evidence and data collected internally by the project consortium.

The EUPATI Project

The European Patients' Academy (EUPATI) is a five-year project started in early 2012 and funded under the Innovative Medicines Initiative (IMI) with the aim of providing scientifically reliable, objective, and comprehensive information to patients and patient advocates on the research and development process of medicines.

In doing so, EUPATI will increase the capacities and capabilities of well-informed patients and patient organisations to be effective advocates and advisors in medicines research, e.g. in clinical trials, with regulatory authorities, and in ethics committees.

Find out more about the European Patients' Academy at: www.eupati.eu.

What are the objectives and expected outcomes of EUPATI?

The paramount objective of the EUPATI is to develop reliable information for patients on modern treatment development and educate patient representatives and the lay public on medicines' research and development, in order to significantly improve the availability of patient-centric information as well as increasing the number of educated patient experts that have the capacity and capability to contribute to medical research.

EUPATI has three specific objectives:

Objective 1: To improve the availability and dissemination of accessible, well-structured, and user-friendly information on new treatment development, clinical trials, efficacy, safety

assessment, and personalised medicine to patients in a format that enables them to access what they need, when they need it.

Objective 2: To improve the capacity of "patient experts" and well-informed patients in patient organisations in order to provide objective, credible, understandable, and accurate information to the wider patient community and public, including hard to reach groups.

Objective 3: To facilitate appropriate patient-relevant advice to industry, academia, authorities, and ethics committees and to ensure genuine patients' partnering in therapeutic innovation, access, and safety.

Who is implementing the EUPATI project?

The Consortium consist of a team of 33 organisations, led by the European Patients' Forum (EPF), and made up of a unique combination of patient organisations, universities, and not-for-profit organisations with expertise in patient and public engagement, along with many European pharmaceutical companies.

Who are we targeting?

EUPATI targets three different audiences:

Patient Experts, trained within the EUPATI Patient Expert Training programme delivered in two cycles with 100 leading patient advocates expected to complete the course by the end of the project.

Advocacy Leaders from Patient Organisations, provided with the EUPATI "Toolbox" including cutting edge educational material for patient advocates, including print material, slide shows for face-to-face presentation, Internet-based "eLearning" courses, webinars and videos, complemented by face-to-face events.

Patients and lay public at large, served by the EUPATI Internet Library on therapeutic innovation, which explains specific aspects of the development process of medicines and related products (medical devices, combination products etc.) for health-interested patients and citizens, including those with low (health) literacy.

Indirectly, the project also intends to benefit the pharmaceutical industry at large, academia, regulators (EMA and national regulatory bodies) and HTA agencies in the way they understand and involve patients in the medicines' R&D process.

How is the project structured and implemented?

The project is organised into seven Work Packages (WP):

WP1 Overall project coordination and management.

WP2 Building an EU-wide network of collaborators to enable knowledge-sharing and expertise on all topics of interest, together with organisation of conferences, regional workshops, and the establishment and coordination of national EUPATI platforms.

WP3 Needs assessment and gaps analysis through surveys and questionnaires to identify current knowledge and understanding of innovative drugs process, and the need for information and educational materials, format preferences, and delivery styles.

WP4 Development of content in six topic areas adapted for each target audience along with strategies for delivery of the educational material and information.

WP5 Development of a dependable, state-of-the-art, user-friendly, and sustainable computer-based infrastructure providing appropriate material to everyone.

WP6 Delivering two expert level training courses in English in two cycles, along with delivery of broader information in seven languages, with tools to measure impact of EUPATI's deliverables.

WP7 Development of a sustainability strategy so resources and materials are updated and remain available beyond the five years of the project, plus guidance on more efficient patient involvement in the medicines development process.

The project is implemented in three phases:

Phase 1 (M1-M18): Preparation phase focuses on WP1, WP2 (Establishment of the EUPATI Network), WP3 (Resource Review and focus groups), WP 4 (Content Development strategy), WP 5 (Design and development of the technical infrastructure) and WP7 (Research on patient partnership models).

Phase 2 (M19-M48): Confirmation Phase focuses on training/education/information content development and the establishment of National EUPATI Platforms in WP4, WP5, and WP6.

Phase 3 (M49-M60): **Sustain Phase** will focus on deployment, dissemination, and future strategies (WP 6, WP7).

Find out more about the European Patients' Academy at:

http://www.patientsacademy.eu/

2 Subject of contract

This Contract refers to the final evaluation of the EUPATI project. The objective of the external evaluation is to contribute to assessing the extent to which has the EUPATI project generated the desired impact against the objectives set out in the description of work.

Specifically, the external evaluator shall devise and carry out appropriate evaluation activities aimed at gathering evidence on the:

- The impact of the project in terms of educating patient advocates on medicines R&D and stimulating their active engagement in this area with a specific focus on

the engagement and involvement of graduates of the EUPATI Patient Expert Training Courses (first cycle completed in December 2015, second cycle ending in November 2016),

- Impact of the EUPATI Toolbox as a leading, seven-lingual repository of educational material for patient leaders on medicines R&D, especially in terms of uptake and use of the Toolbox in the patient community,
- Impact of the ~16 EUPATI National Platforms, especially in terms of levels of activity, visibility and inclusiveness of the different stakeholder groups on the national level (specifically the EUPATI National Platforms in Austria, Belgium, France, Germany, Ireland, Italy, Luxembourg, Malta, Poland, Spain, Switzerland, UK, Denmark, Slovakia, Serbia, Romania, Portugal and the Netherlands).
- Impact of the project in terms of enabling learning and changing practices within patient organisations, industry, and regulators (both European and national level) as well as HTA bodies,
- Any other highly relevant impact generated by the project.

3 Duration of the contract

The assignment shall start on **1st October 2016** and shall be completed by **15 January 2017**.

4 Tasks for the external evaluator

The service will be considered completed upon successful accomplishment of the following tasks:

Task 1: **Evaluation Plan (10th October 2016):** This shall include highlighting the key evaluation criteria, evaluation questions, and related indicators applicable to measure the impact of the Course, the Toolbox, the National Platforms, as well as processes and practices within the stakeholder groups. The Evaluator shall also mention all evaluation activities and related methods he/she intends to perform and use to complement the findings of internal evaluation activities already performed by the Consortium. The task will be considered completed upon approval of the Evaluation Plan by EUPATI. **Deliverable D1 Evaluation Plan**

Task 2: **Producing the Draft Evaluation Report (15th December 2016):** The Evaluator shall produce a first draft report outlining the key findings of the evaluation. **Deliverable D2 Draft Evaluation Report**

Task 3: **Producing of a final Evaluation Report (15 January 2017)**. **Deliverable D3 Final Evaluation Report**

5 Structure of the Evaluation Report

The Evaluation Report shall be structured as follows:

- Executive summary: overview of main findings,
- Objective of EUPATI evaluation,
- Evaluation Methodology and Methods,
- Evaluation findings against indicators in the areas of
    - Impact of the Patient Expert Training Course
    - Impact of the Toolbox
    - Impact of the National Platforms
    - Impact on processes and procedures of stakeholders
    - Impact in terms of sustainability of the project
    - Other key impacts generated by the project
- Discussion: critical analysis of findings against evaluation questions,
- Recommendations based on evaluation findings.

6 Participation in the tendering procedure

6.1 Eligibility criteria

EUPATI is looking for proposals from individuals with at least 5 years of proven successful experience in programme and project monitoring and evaluation (including impact assessment).

Knowledge and experience in one or more of the following areas will be considered key assets:

- Knowledge/experience of medicines' research and development, especially Clinical Trial Design and Conduct, Regulatory affairs, and Health Technology Assessment,
- Thorough knowledge about patient advocacy, dynamics and educational needs of the patient advocacy community, as well as the fundamentals of patient organisations' involvement in healthcare, especially in the area of medicine's research and development.
- Understanding of the sensitivities of a public-private partnership (PPP) nature of a project like EUPATI, especially between patients, industry, and academia,
- Basic understanding of differences of countries in terms of medicines R&D and patient advocacy, in order to evaluate the impact of EUPATI not only in English-speaking countries

- Experience in science education and communication to the general public,
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6.2 Language requirements

Applicants must have very good knowledge of the English language.

6.3 Selection procedure

Participation in this tendering procedure is open on equal terms to all natural and legal persons fulfilling the abovementioned eligibility criteria and language requirements.

The selection will be done based on expertise (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 1 week following the deadline date.

7 Volume of contract

The maximum contract price is EUR 15.000 including fees and VAT. At least 30 days are required to complete this assignment.

Prices must be fixed amounts in Euro.

The amount of VAT should be shown separately.

8 Terms of payment

An interim payment corresponding to 75% of the contract value agreed with the winning tenderer will be released by EUPATI upon successful completion of **Task 2 Draft Evaluation Report** and receipt of the following:

- D2: Draft Evaluation Report
- Invoice

A final balance payment will be released by EUPATI upon completion of **the final Evaluation Report** and receipt of the following:

- Final evaluation report
- Invoice

A different payment schedule can be negotiated between EUPATI and the evaluator upon negotiating the contract.

9 Quality issues

In delivering the service, the consultant shall ensure the highest quality standards of which the EUPATI Consortium shall be the sole judge.

10 Confidentiality

The Evaluator undertakes that they will not at any time, either before or after the termination of this service, use, disclose, or communicate to any person confidential information relating to the affairs of EUPATI and/or the members of the EUPATI Consortium of which they may become possessed except insofar as disclosure is required in providing the Services, or in respect of which EUPATI has given prior consent in writing. This restriction shall continue to apply after the termination of the service without limit in point of time.

11 Conflict of interest

To ensure the independence of proposal evaluations, on conclusion of their contract, the experts selected will have to sign a declaration certifying that they have no conflict of interests for the evaluation concerned and that they without delay will inform the Project Director if such conflict of interests should emerge during the course of the evaluation.

12 Tender submission

To be considered for this service, tenderers with the required profile shall submit the following documents:

- Tender submission form (Annex 1),
- CVs of the evaluator(s),
- Relevant examples of evaluation work performed as appropriate.

The offer needs be submitted electronically in English by the 25th September 2016 to Mr Walter Atzori, Director of Programmes and Operations at the European Patients' Forum (walter.atzori@eu-patient.eu) and Jan Geissler, EUPATI Director (jan@patientsacademy.eu)