

Call for Tenders

Summer Training Course for Young Patients Advocates – Leadership Programme 2017

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 67 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 delivery of the first Summer Leadership Programme for Young Patients Advocates 2017

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 Youth Group and developed Youth Strategy to address these issues in a systematic and organized manner. Since then, the Youth Group organized meetings and engaged in youth projects to share first-hand experiences and good practices with young patients from all over the EU. 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 first Summer Training Course for Young Patients Advocates - Leadership Programme for young patients advocates. As such, the leadership programme intersects with all EPF thematic, namely patients' empowerment, patients' involvement and sustainable organizations.

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 organizations and different countries. They will discuss and explore common issues relevant for young patients' and patients' movement across the Europe and in this way they will maximize their advocacy impact within their countries. The event will be organized on annual basis, and designed according to the emerging needs.

The overarching theme for this year's event is the Summer Training Course for Young Patients Advocates - Leadership Programme is: overcoming discrimination

Non-discrimination is a fundamental element in human rights law. What rights and responsibilities do young patients have? What groups of patients are most vulnerable to accessing health care on the basis of discrimination? What can be done to ensure that patients, in particularly young patients, stop facing stigma and discrimination within healthcare system, work and wider environment? How young patients' advocates can have a bigger participating role in their own organizations and decision-making processes?

During the summer leadership programme, participants will gain insight into the complexity of this issue and address it through interactive debates, group exercises and concrete action plans.

2. Purpose and Nature of the Summer Leadership Programme

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

Specifically, the programme targets around 40 (forty) young patients advocates (ages 18 – 30) from EU Members States and the Western Balkan Countries who have either the EU official candidate or potential candidate countries status:

- 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 Leadership Programme 2017: To contribute in building capacities of young patients/their representatives to involve in patient organisations and advocacy work in their respective countries in a meaningful way.

Specific objectives:

- To increase confidence and provide a simulative learning environment for participants to fully embrace their role as patients' advocates
- To increase participants' knowledge about the key attributes of patients' advocacy organisation led in an accountable and transparent manner
- To strengthen participants' strategic communication and advocacy skills
- To foster participants' future engagement in public awareness and advocacy efforts in their respective countries

Summer Leadership Programme 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 training course
- The percentage of the total number of selected participants who is taking part in the collection of information about discriminatory practices in their respective countries with a view to prepare for the training course sessions
- The level of participants' involvement into debates and group interactions
- The level of participants' satisfaction with the training course i.e. the relevance of the topics and the adequacy of received materials
- The proportion of the target group completing the training (no drop outs)

Summer Leadership Programme Output Indicators:

By the end of the event, following outputs will be available:

- The increased level of knowledge about the key concepts covered by the training as measured by pre and post test
- A group statement on how to overcome discrimination in the work place
- At least 3 advocacy strategies and action plans developed that address the most critical discrimination issues that young patients face in their respective countries
- Development of a comprehensive individual follow-up plans (small projects) to raise awareness of the campaign and discuss their perspective on universal health coverage for the development of the roadmap
- List of topics for the summer training event in 2018

Summer Leadership Programme Short-term Outcome Indicators:

Immediately after the completion of the training course, the evaluation will be put in place in order to measure:

- The extent to which participants perceive that the training course helped them to build self-confidence and increase level of self-esteem
- The extent to which participants perceive that the training course helped them to boost self-power and enhance their leadership potentials
- The extent to which participants perceive that the training course helped them to increase their sense of purpose to act as patients' advocates
- The extent to which participants perceive that the training course helped them to build social and cultural competencies with other participants
- The extent to which participants perceive that the training course helped them to feel resourceful to become involved into work of their organizations
- The extent to which participants perceive that the training course helped them to recognize discriminatory practices and to be able to speak up for one's rights

- The extent to which participants perceive that the training course helped them to feel empowered to make positive changes in their environments

Summer Leadership Programme Medium-term outcomes/Impact Indicators:

Following a period of 2-3 months of individual coaching and distant support, the 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 organizations
- 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 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 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 five phases: baseline assessment; first face-to-face training; coaching phase; second face-to-face training; final coaching and completion of the module.

Assessment

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

Training Course

The Summer Training Course will be in duration of three (3) full days and will cover following topics:

1 DAY

Topic I: Self-Leadership

Participants will have an opportunity to explore their own roles and responsibilities as patients advocates, critically assess various unprofessional, unethical situations that may occur while advocating for patients' rights and learn how to become more resilient when facing stigma and discrimination.

Suggested methodology: reflection time, self-assessment questionnaires, practice tests, peer to peer support etc.

Topic II: Leading Patients' Advocacy Organisations

Participants will have an opportunity to learn about the nature of patients' advocacy organizations as non-for-profit organisations, key attributes of good governance, the importance of strategic thinking and diversification of funding. They will practice how they can initiate changes within their organisations to fight against discrimination practices.

Suggested methodology: presentations, interactive debates, etc.

II DAY:

Topic III: Advocacy - Leading for influencing change at the institutional level

During the plenary session participants will learn about the most commonly used advocacy tools and techniques such as: policy monitoring and campaigns for policy change. After the theoretical part, participants will be tasked to develop advocacy strategy and plan(s) in order to overcome discriminatory practices (ex.: work place etc.).

Suggested methodology: presentations, ½ day-long group practical exercise, individual coaching, after-the-session group teambuilding games and exercises

III DAY:

Topic IV: Advocacy – Leading for influencing societal changes

This session will provide participants with various real case studies about the rights movement across the world (ex.: women, etc.) and their long-term efforts in changing misperceptions and prejudices and making impact in their own environments.

Suggested methodology: presentations, discussions, individual/per country action plans

Please note that the EPF will invite a few key speakers to deliver speeches on Discriminations Issues, Advocacy or Communication. In this case, the role of the tenderers/trainers will be to moderate sessions, and include their observations about these sections in their report.

Training Course Follow-up

Following the summer training course, the tenderers/trainers will provide guidance, individual support and advices to each participant, upon request, in terms of their potential leadership capacities and/or specific advocacy issues they may have. It will also help the organisation committee to gather best practice cases and to provide the recommendations for the next year' event.

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 in how they will meet these requirements.

As a result of the evaluation and recommendations, the organization committee will identify those target groups/training topics/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 2018 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 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 (ex.: follow-up etc.).

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

Task	Task Description	Days	Deliverables Description	Estimated Due Date
T(I)1	<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 etc. and - Conduct the assessment of participants' knowledge on Discrimination issues 	7 days	A report which summarizes applicants' motivations, interests and future, and a set of recommendations in order to tailor the training course and training follow-up phase.	30 days after the signing the contract
T(I)2	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
T(I)3	Following the approval of the training plan by EPF, develop pre and post-tests, presentations, handouts, training materials, evaluation questionnaires	5 days	A set of training materials ready for the use during the training course in Vienna	By the end of June 2017

	and other needed materials for participants			
T(I)4	Deliver the training course and moderate sessions with the external speakers in Vienna	3 days	A comprehensive training report of the training course	3 – 5 July 2017
T(I)5	Follow-up by means of mentoring/advice/working together with participants to implement their advocacy campaigns (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)
T(I)6	Conduct the evaluation, and write recommendations for the Leadership Programme 2018	2 days	A final 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 in February 2017.

February 2017	Review of received Applications
March - April 2017	Participants Knowledge Assessments and Rough Training Design
May - June 2017	Detailed Training Design (presentations, handouts, etc.), Final preparation
July 2017	Training Course in Vienna
August – October 2017	Training Course Follow-Up
November 2017	Evaluation & Recommendations

3. Volume of contract

The maximum contract price is EUR 12.000 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.

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 Selena Imerovic Hodzic, Capacity Building Officer, selena.imerovic@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 criteria 1:	Relevance of the training experience and expertise of the proposed team to the Youth Leadership & Advocacy, including their assigned roles	25 points

Qualitative criteria 2:	Understanding of the nature and purpose of this service in terms of Youth Patient Advocacy in the current EU public healthcare, and patient discrimination context	25 points
Qualitative criteria 3:	Relevance, feasibility and quality of the detailed methodology proposed, including the work plan	25 points
Criteria 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 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.

4.5. SCHEDULE

The assignment shall start as from the date of signature of both contracting parties and shall be completed by end of November 2017, at the latest.

Tender submission and schedule of the work are as follows:

Launch Tender	EPF	23.01.2017
Close of the Tender	Tenderer	17.02.2017

Selection of the tenderer	EPF	22.02.2017
Briefing meeting/Signature of the Contract	EPF - Tenderer	23-28.02.2017

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 undertake to inform EPF's Walter Atzori, Directors of Programmes and Operations should this status change.

8. 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.

9. Contracting authority

European Patients' Forum (EPF)
Rue du Commerce 31
1000 Brussels