

## **Attachment No. 1 to the Terms of Reference**

### **Precise description of the subject of the contract**

Concerns: the tender procedure for the development and delivery of a training programme for “POLONEZ” programme fellows carried out by the National Science Centre.

The POLONEZ programme is co-financed by the European Commission under the EU “Horizon 2020” research and innovation funding programme, pursuant to agreement No. 665778 on the co-financing of Marie Skłodowska-Curie measures. A detailed description of the POLONEZ programme has been enclosed as Attachment 1a to the Terms of Reference.

The required service will be financed entirely from Polish public funds.

The subject of the tender is the development and delivery of a training programme for “POLONEZ” fellows. The purpose of the training programme is to develop the POLONEZ fellows’ diverse skills, and, in addition to the research grant and individual salary for the participant, it constitutes an integral part of the support granted by the National Science Centre.

#### **I. GENERAL INFORMATION**

1. The subject of the tender is the development and delivery of a training programme for POLONEZ fellows.
2. The training programme consists of workshops, which are the basic area of support, and networking meetings, whose purpose is to develop diverse skills that will be useful in research and other areas of life.
3. All components of the training programme will be conducted in English.
4. The required service includes:
  - a. developing and delivering the training programme in compliance with the concept presented in the procedure,
  - b. assessing the levels of knowledge/skills/needs of ca 112 POLONEZ fellows by way of an electronic survey, and presenting to the Contracting Authority the survey’s results together with a list of ca. 10 persons with outstanding experience and skills, recommended for individual coaching processes, organised separately by the Contracting Authority,
  - c. contacting the training programme participants directly, and allocating the participants to training groups,
  - d. drawing up a schedule/calendar for workshops and networking,
  - e. providing trainers to conduct workshops and experts to conduct networking meetings,
  - f. securing accommodation and transportation for the trainers and experts during the workshops and other forms of support in locations indicated by the Contracting Authority (i.e. in Warsaw),
  - g. providing training materials for every workshop participant and coordinator representing the Contracting Authority,

- h. drawing up an evaluation form for the purpose of the participants' assessment of the workshops and networking meetings,
  - i. conducting an evaluation of each workshop and networking meeting and – upon the completion of the training programme – drawing up an overall written evaluation of the training programme as a whole.
- 5. The tender does not include nor does it apply to:
  - a. the service of developing and delivering coaching focused on the research careers of selected participants of the training programme,
  - b. the service of renting conference rooms, including equipment, for the purpose of conducting the workshops and networking meetings,
  - c. the service of catering for the providers and participants of the workshops and networking meetings,
  - d. the service of providing accommodation for the participants of the workshops and networking meetings,
  - e. the service of transportation to the workshops for training programme participants.
- 6. Pursuant to the Contracting Authority's projections:
  - a. the workshops will take place in Warsaw, on premises provided by the Contracting Authority, equipped with tables, chairs, a data projector and loudspeakers; the Contracting Authority does not require that the Contractor provide workshop participants with computers,
  - b. the approximate number of workshop and networking meeting participants will be 102, allocated by the Contractor to 7 fixed training groups following the same training course at different times, in compliance with the schedule referred to in I.4(d),
  - c. the training programme will consist, in total, of 21 2-day priority workshops described in item V; the Contracting Authority reserves the right to increase the number of workshops by up to 14 optional workshops described in item V hereof, i.e. to the total maximum number of 35; the minimum number of workshops can be increased depending on the needs of the training programme participants in the effective period of the contract to deliver a training programme for POLONEZ fellows,
  - d. the total number of networking meetings in the training programme is no less than 3 and no more than 6.
- 7. The contract shall be completed within the timeframe spanning from the day of signing to 31 December 2019.

## **II. FORMS OF SUPPORT**

- 1. The training programme should consist of:
  - a. workshops (basic form of support),
  - b. networking meetings (complementary form of support).

2. Workshops should be the basic form of support, and their main purpose should be providing participants with specific skills from the scope indicated in item V hereof titled the **THEMATIC SCOPE OF THE TRAINING PROGRAMME**. Each workshop should be carried out by one or two trainers. Each training day should consist of at least six full hours (6 x 60 mins) of effective training and at least two coffee breaks and one 1-hour lunch break. The workshops should start no earlier than 08:00 a.m. and no later than 09:30 a.m.
3. Networking meetings should be a complementary form of support, their main purpose being to enable the participants to come into contact with excellent practitioners who have substantial professional experience in the fields consistent with the thematic scope of the training programme. In the case of this form of assistance, the fields preferred by the Contracting Authority are specifically cooperation between science and business (e.g. meetings with representatives of R&D businesses, researchers who have successfully commercialised their results), management in science or promotion and the dissemination of science. An additional objective of the networking meetings should be offering the training programme participants the opportunity to meet one another and to meet other persons who are not POLONEZ fellows, but who have similar professional experience or are at a similar stage of their career in research. The minimum time of a networking meeting is 2 hours (2x60 minutes). Networking meetings should take place on the first day of a workshop, but should not overlap with the time of the workshop itself. Each networking meeting should include at least 24 training programme participants, but not more than 3 training groups if their workshops are held at the same time (during the same weekend). Networking meetings can also be attended by persons who are not POLONEZ programme fellows, invited by the Contracting Authority, and their participation will not require additional payments by the Contracting Authority. The number of persons who are not POLONEZ fellows cannot exceed the number of the training programme participants taking part in a given networking meeting.

### III. TRAINING PROGRAMME PARTICIPANTS

1. Participants of the training programme will be POLONEZ fellows, who are researchers from different countries, including persons returning to Poland after a longer stay abroad, carrying out their research projects in Polish research institutions. They represent a wide range of scientific disciplines, including the Humanities and Social Sciences. Most are at a similar stage of their career in research, i.e. postdoctoral fellowship.
2. All training programme participants have a sufficient command of English to participate in a training programme carried out in English.
3. The Contracting Authority assumes that the training programme participants will be allocated to 7 fixed training groups and will participate in the training programme in accordance with the schedule of their respective group. There may be no fewer than 12 and no more than 18 persons in any given training group. Allocation to training groups will be carried out remotely by the Contractor with the use of electronic means of communication, in cooperation with the Contracting Authority and the POLONEZ fellows, after the tender procedure has been concluded. The allocation to groups should also have regard to the level of the participants' skills.

4. Allocation to groups should take into account the programme participants' time constraints resulting from their choice of the period to complete the POLONEZ grant in Poland. Since POLONEZ programme fellows have been selected in three subsequent calls over the course of 12 months, their arrival in Poland takes place in the period spanning from September 2016 to January 2019 and the length of their stay in Poland is either 12 or 24 months. The exact dates of their stay in Poland are agreed individually with each fellow.
5. Once the contract for the training programme has been signed, the Contracting Authority will provide the Contractor with the information on the dates and length of each POLONEZ fellow's stay in Poland, and will enable the Contractor to contact the fellows directly, by electronic means.

#### IV. CONCEPT OF THE TRAINING PROGRAMME

1. The Contractor is to develop and deliver the training programme for the POLONEZ fellows based on the training programme concept enclosed to the submitted bid.
2. The purpose of the training programme is, in the first place, to broaden participants' knowledge and to strengthen their skills in, among others: personal effectiveness, teamwork, dissemination of research results, management, protection of intellectual property, strategic thinking & decision making, managing conflicts in a team & solving problems, etc. These skills will facilitate the realisation of their career plans, which pertain in particular to achieving academic independence, acting as principal investigators to large research projects and/or establishing their first research team. The training programme should also facilitate establishing the participants' cooperation with other sectors, in particular with business and industry, and contribute to their better understanding of the specifics of research commercialisation, transfer of technology, the roles played by individual actors in the process, thereby encouraging the participants to engage in cross-sectoral cooperation. The objective of the networking meetings is to enable the participants to meet excellent practitioners who have substantial professional experience in the fields consistent with the thematic scope of the training programme.
3. The training programme concept should meet the requirements specified above, taking into account the **THEMATIC SCOPE OF THE TRAINING PROGRAMME** included in item V. The concept should also explain the methods the Contractor intends to employ in achieving the goals and identify the competences acquired by the participants during the training programme. What is more, the concept should take into account the specific characteristics of the academic sector and present the practical applicability of knowledge taught.
4. The document titled *Training Programme Concept* should not be longer than 6 pages (size – A4, font – Times New Roman, font size – 11 points, single leading, side margins – 2 cm, top and bottom margins – 1.5 cm).

#### V. THEMATIC SCOPE OF THE TRAINING PROGRAMME

1. The POLONEZ fellows' training needs are identified on the basis of a survey. Based on the survey results and the objectives of the POLONEZ programme, 5 thematic areas have been identified for the purpose of inclusion in the training programme, namely, personal

effectiveness, working with others, management, communication and protection of intellectual property, technology transfer and commercialisation of research results. The first three thematic areas (1-3), indicated in the table below, are hereinafter referred to as priority areas, while the two subsequent ones (4-5) as optional areas.

No	WORKSHOP'S THEMATIC AREA	KEYWORDS
1.	PERSONAL EFFECTIVENESS	prioritising and planning
		time management
		change management
		stress management
		"work-life balance"
2.	WORKING WITH OTHERS	team work
		networking
		negotiations
		recruiting & building a team
		managing a team, planning and organising work & delegating tasks
		managing conflicts in a team & solving problems
		supporting others' development – managing
		supporting others' development – mentoring
		supporting others' development– coaching
		evaluating others & providing feedback
3.	MANAGEMENT	developing a research strategy
		planning and conducting a research project
		managing a research project
		strategic thinking & decision making
		risk management
		finance management
		public procurement in science
4.	COMMUNICATION	public speaking
		presentations and teaching classes
		giving research seminars & conference talks
		writing scientific texts

No	WORKSHOP'S THEMATIC AREA	KEYWORDS
		presenting results of research
		writing texts and presenting for non-specialist audiences
		working with media
		social media
		public engagement
5.	<b>PROTECTION OF INTELLECTUAL PROPERTY, TRANSFER OF TECHNOLOGY AND COMMERCIALISATION OF RESEARCH RESULTS</b>	copyright
		attribution & authorship
		patents and trade marks
		protection of intellectual property in the Internet
		open access
		researching and verifying commercialisation potential
		building a commercialisation strategy
		creating, interpreting and assessing intellectual property
		legal bases: agreements and licenses in the commercialisation process
		raising funds and relations with potential partners (investors)

2. In their training programme concept, the Contractor should include:
  - a. a mandatory programme dealing with 3 priority thematic areas (indicated in the table above: points 1-3),
  - b. an optional programme dealing with the other 2 thematic areas (indicated in the table above: points 4 & 5),
  - c. the concept of at least three networking meetings.
3. In their training programme concept, the Contractor must present the workshop framework programmes for each of the five thematic areas.
4. Once the training programme contract has been signed, the Contractor will fine-tune the final programme of workshops to the participants' level of knowledge and needs, based on the survey carried out by the Contractor in compliance with section 1.4b. The Contractor must carry out the survey and present its aggregated results to the Contracting Authority no later than 3 weeks after the contract is signed. No later than two days before distributing the survey among POLONEZ fellows The Contractor shall provide the Contracting Authority with the electronic version of thereof, with the possibility to submit comments.
5. The Contracting Authority reserves the right to inspect the source materials of the survey.

6. The Contractor shall develop the final programme of each workshop at least 30 days before the scheduled workshop date. The Contracting Authority reserves the right to inspect such programme. Should any comments be submitted by the Contracting Authority within 7 days, they shall be binding the Contractor.

## **VI. MINIMUM PARTICIPATION IN THE TRAINING PROGRAMME**

1. In individual agreements signed with POLONEZ fellows, the participants are obliged by the National Science Centre to participate in the training programme. The fellows are obliged to participate in three workshops dealing with three priority thematic areas.
2. Additionally, apart from participating in at least 3 priority workshops, each participant has the right to apply for participation in additional workshops dealing with the two optional thematic areas. The Contracting Authority shall consider the option described in item I.6c on the condition that at least 12 participants express their interest in that particular thematic area.
3. The Contractor must ensure that each training programme participant can freely choose a training group with the most convenient workshop schedule from the perspective of the dates of the participant's fellowship in Poland. Each of the selected thematic areas will be given two workshop days (a two-day workshop).
4. Networking meetings are an additional form of support, important because of its additional reinforcing contribution to the selected thematic area in the training programme, including, in particular, the area related to the transfer of technology and commercialising the results of research. Participation in networking meetings is not mandatory for participants, although it is strongly recommended by the Contracting Authority.
5. Each training group should be able to participate in at least one networking meeting on the same day it takes part in the workshop. The Contractor can plan more networking meetings up to a maximum total number of 6.
6. After having conducted an assessment of the knowledge/skills/needs of ca 112 POLONEZ fellows by way of an electronic survey, the Contracting Authority will present a list of ca 10 persons with outstanding experience and skills, recommended for individual coaching processes, organised separately by the Contractor Authority, instead of workshops. Such persons will, nevertheless, be free to participate in the networking meetings. The service of the coaching processes is not a subject of this contract.

## **VII. TRAINERS AND EXPERTS (CONTRACTOR'S PERSONNEL CARRYING OUT THE TRAINING PROGRAMME)**

1. The Contractor will ensure that the workshops are carried out by at least 5 qualified trainers. Each person indicated as a trainer in an individual workshop should also:
  - a. have a university education;

- b. have at least 3 years of documented experience in training consistent with the thematic areas outlined in item V titled, the **THEMATIC SCOPE OF THE TRAINING PROGRAMME**;
  - c. have carried out, by the date of submitting the offer, at least 10 training sessions dealing with the thematic area to which they are assigned;
  - d. identify three institutions to which it has provided training, including at least one research institution that the Contracting Authority may contact for references for the purpose of confirming the qualification of that trainer; research institutions should be understood as universities, research institutes and research funding institutions.
  - e. have a command of English that allows for sufficient execution of the workshop; each trainer confirms their command of English by presenting a written declaration stating that their command of the language allows them to conduct a workshop, accompanied with a list of at least 5 training sessions carried out in English.
2. Workshops will be conducted by persons specified in the list enclosed with the bid. Each of the listed persons will be assigned to at least one of the workshops' thematic areas, described in the item titled, the **THEMATIC SCOPE OF THE TRAINING PROGRAMME**. For each thematic area the Contractor must assign at least 1, but no more than 3 persons capable of carrying out a workshop and having documented training experience in the relevant topic.
  3. In justified cases (such as acts of God), the Contractor can extend the list by adding additional trainers who meet the criteria laid down in items 1. Every change of this type requires the Contracting Authority's consent.

#### VIII. TRAINING MATERIALS

1. The Contractor provides training materials that contain at least:
  - a. the workshop/networking meeting schedule and the trainers' bios,
  - b. printouts of presentations (with a space for note-taking) and other materials to be used by the participants during the training, e.g. case studies.
2. The Contractor is obliged to provide the Contracting Authority with all training materials in an electronic form which allows for the insertion of comments no later than 14 days before the scheduled date of the training. The Contracting Authority reserves the right to consult the contents of the materials.
3. The Contractor is obliged to provide the participants with all training materials in an electronic form at least 3 days before the scheduled date of the training and as hardcopies on the first day of the training.
4. All materials should be in order, stored in a file/binder/folder, numbered, including the topic of the training, the date, and the trainers' contact data.
5. Within the contract, the Contractor **will provide** Programme Participants with additional materials (extension of the workshops) in the following thematic areas:



- a. personal effectiveness,
- b. working with others,
- c. management,
- d. communication,
- e. protection of intellectual property, technology transfer and commercialisation of research results.

Additional materials shall include, among others, tasks relevant to the knowledge taught and may include multimedia/interactive training resources, practice tasks with answers/feedback or the opportunity for programme participants to consult with trainers through computer-mediated communication.

The Contractor shall provide additional materials based on the additional materials concept enclosed to the submitted bid.

The document titled *Additional Materials Concept* should not be longer than 1 page (size – A4, font – Times New Roman, font size – 11 points, single leading, side margins – 2 cm, top and bottom margins – 1.5 cm).

6. All training materials must be in English.
7. The Contractor is obliged to mark all training materials and additional materials for Programme Participants with the National Science Centre's and European Union's logos, alongside information on co-funding the POLONEZ programme from the EU funds. All logos and the above-mentioned information will be provided by the Contracting Authority on the dates agreed by the parties in the course of their regular cooperation.

## **IX. TRAINING SCHEDULE**

1. The Contractor will present a draft version of the training schedule, including both priority and optional programme, within 2 weeks from the presentation of the results of the survey referred to in item I.4b.
2. In drafting the schedule the Contractor will have regard to the following:
  - a) workshops will take place in the period between 1<sup>st</sup> January 2018 and 31<sup>st</sup> December 2019, excluding the summer months, i.e. July, August and September;
  - b) workshops will take place only on weekends, with the reservation that the participants are assumed to arrive in the training venue on Friday evening. Saturday and Sunday are considered full training days at the Contractor's disposal;
  - c) workshops for individual groups will take place at intervals no shorter than 4 weeks,
  - d) the Contracting Authority reserves the right to conduct workshops for no more than 3 individual training groups over one weekend;
  - e) owing to the assumed division of the training programme participants into fixed training groups covering the training programme at different times, it is recommended that the schedule of the workshops and networking meetings should be arranged in a manner that enables participants of separate groups to have contact with one another; for this reason it is preferred that 2 or no more than

3 workshops (for different groups) be carried out simultaneously/parallel to one another, i.e. on the same premises and at the same time.

3. The training schedule should be arranged in such a manner as to allow for identifying the date, and the type of planned form of support (workshop/networking meeting), the groups concerned (group 1, 2, 3 etc.), and the thematic area involved.
4. At the request of the Contracting Authority or the Contractor, the training schedule can be modified, but any modifications requested by the Contractor require the Contracting Authority's approval. Changes to the schedule may not bring about a reduction in the number of training sessions below the limit set out in item I.6c.

**X. EVALUATION AND ACCEPTANCE OF WORKSHOPS AND OTHER FORMS OF SUPPORT, AND THE ACCOUNT OF THE TRAINING PROGRAMME**

1. Having completed a form of support (workshop, networking meeting), the Contractor carries out its evaluation. The evaluation is to be understood as the feedback prepared by the Contractor for the Contracting Authority in writing based on the results obtained from evaluation forms filled out by the participants and subjective assessments of the trainers and experts involved. The basic purpose of the evaluation is to determine whether and to what extent the objectives set out for a given form of support have been met. The Contractor's evaluation takes into account the survey assessing substantive content and the participant's opinion on the persons running the relevant form of support.
2. Following each concluded workshop or networking meeting, a certificate of acceptance will be drafted. The certificate of acceptance confirms that the service has been provided correctly, and if signed without any qualifying remarks by the Contracting Authority, is a proof that the service has been delivered without reservations. In the event of reservations arising, these are included in the certificate of acceptance, and may constitute the basis for reducing remuneration due to improper performance of the service.
3. The Contracting Authority reserves the right to organise a survey on the quality of the service among participants. The survey results can be the basis for reservations referred to in item 2 above.
4. Upon completion of the entire training programme, the Contractor will also prepare their written account of same, indicating which objectives of the training programme have been met and to what extent; the Contractor will also offer conclusions on the completion of the training programme. In the account, the Contractor will take into account the participants' opinions on the training, and will make available to the Contracting Authority the source material, i.e. the contents of the assessment surveys which were filled out by the training Programme Participants.