**EPF CAPACITY BUILDING PROGRAMME FOR PATIENT ORGANISATIONS in Poland**

**CALL FOR TENDER**

**Experts in Strategic Planning and Organisational Capacity Needs’ Assessment**

#### Purpose and context of contract

The purpose of the contract is to plan, coordinate, and implement the process for the development of a strategic plan and needs’ assessment for 6 patient organisations in Poland in 2013.

This contract will support the implementation of the **European Patients’ Forum’s Capacity Building Programme for Patient Organisations** taking place in 2012-2014 in the following countries: Bulgaria, Hungary, Latvia, Poland, Romania, and Slovakia.

**The European Patients’ Forum**

EPF is the umbrella organisation of pan-European patient organisations active in the field of European public health and health advocacy.

We currently represent 57 patients organisations – which are chronic disease specific patient organisations operating at EU level and national coalitions of patients organisations.

EPF’s vision is high quality, patient-centred, equitable healthcare for all patients throughout the European Union.

EPF facilitates exchange of good practice and challenging of bad practices on patients’ rights, equitable access to treatment and care, and health-related quality of life between patient organisations at European level and at Member state level.

See [www.eu-patient.eu](http://www.eu-patient.eu)

**The EPF Capacity Building Programme**

The overall objective of the Capacity Building Programme is to strengthen the capacity of both national and European level Patients’ Organisations to enable them to be more effective in achieving their objectives and aspirations, also in feeding their experiences and expertise into the work of EPF and utilising the outcomes of our collective work in a national, and/ or disease specific context.

The Programme responds to needs and concerns which have been identified by EPF membership during previous activities of EPF and will focus on the improvement of organisational capacities and advocacy skills of patient organisations.

In 2012 the programme was piloted in Romania and Hungary with the support of EPF’s members in these countries. Globally 20 national-level patient organisations from those two countries are involved in the Programme. Seven European-level patient organisations also started participating in the programme in 2012.

In 2013 the Programme will be extended to three more countries: Bulgaria, Poland, and Slovakia.

The Programme will be delivered in national languages by local experts in organisational development and will consist of two phases:

1. **Strategic Planning and organisational capacity assessment**

This phase will be implemented throughout 2013 and will lead to the development of a strategic plan and identification of organisation’s capacity needs for each organisation.

1. **Implementation of training modules**

Based on organisations’ goals and aspirations as defined in the Strategic Plans and drawing on outcomes of the organisational capacity assessment, training modules will be developed and implemented in 2014 in the local languages.

#### Subject of contract

This contract refers to the delivery of the first phase of the programme in Poland only.

Accordingly, it foresees the delivery of two distinct but closely related services, namely strategic planning and organisational capacity needs’ assessment for 6 patient organisations in Poland.

**2.1 Specific Tasks:**

The two services mentioned above consist of the following tasks:

**Task 1**: Defining in close cooperation with EPF the process and work plan for developing a Strategic Plan for the 6 organisations

**Task 2**: Adaptation and translation of an organisational capacity assessment tool that will be provided by EPF

**Task 3**: Development of situational analyses in collaboration with each of the 6 patient organisations

**Task 4**: Running of six 1-day strategic planning meetings (1 per organisations) including the needs’ assessment\* and eventually a pre-meeting and a follow-up meeting to finalise strategic plans and agree on training needs for each organisation.

**Task 5**: Undertaking a capacity needs’ assessment with each organisation using the organisational capacity assessment tool

**Task 6**: Submitting 6 Strategic Plans – Final version, and Final analysis of organisational capacity needs for 6 organisations including recommendations for training.

*\*The logistics setting will not be a task for the contractor but of EPF Members in Poland.*

**2.2. Deliverables:**

The following deliverables shall be submitted to EPF:

**Deliverable 1:**

* **Organisational capacity assessment tool** in Polish adapted to the needs of patient organisations in Poland (if and as needed)

**Deliverable 2:**

* **Work Plan** defining all the steps of the process and a timeframe

**Deliverables 3.1-3.6:**

* **6 Situational analyses** (using a template provided by EPF) consisting of:
* External environmental analysis of the Polish health sector common to all organisations
* External analysis of issues related to the disease specific to the organisation at stake
* Baseline information and SWOT analysis of the organisation at stake

**Deliverables 4.1-4.6**:

* **6 Reports one for each strategic plan meeting** using a template that will be provided by EPF

**Deliverables 5.1-5.6:**

* **6 Strategic Plans** using a template that will be provided by EPF

**Deliverables 6.1-6.6:**

* **6 Analysis of organisational capacity needs for 6 organisations**, including clear **Recommendations** for training modules to be run as from 2014.

**2.4 Timeframe**

The following timeframe is based on contract’s starting on May 1st 2013

|  |  |  |
| --- | --- | --- |
|  | **Deadline** | **Task** |
|  | **1 May 2013** | **Assignment starts** |
| **T1** | **10 May 2013** | Defining in close cooperation with EPF the process and work plan for developing a Strategic Plan for the 6 organisations. |
| **T2** | **20 May 2013** | Adaptation and translation of an organisational capacity assessment tool that will be provided by EPF. |
| **T3** | **20 June 2013** | Development of 6 situation analyses |
| **T4** | **15 September 2013**  (meetings shall be taking place between 1 July and 15 September 2013) | Running of six 1-day strategic planning meetings  Report on each strategic plan meeting shall be submitted within two weeks from each SP meeting |
| **T5** | **15 October 2013** | Undertaking needs assessment with each organisation. |
| **T6** | **15 November 2013** | Submitting:  6 Strategic Plans – Final version  Final analysis of organisational capacity needs + Recommendations for training for 6 organisations |
|  | **30 November 2013** | **Assignment ends** |

**2.5 Meetings and cooperation**

This service will require some meetings with EPF staff and with representatives of the 6 patient organisations to fine tune planning and reviews of drafts.

A kick-off meeting involving the contractor, a representative of EPF, and representatives of the 6 patient organisations will be held on the second or third week of May upon finalisation of the strategic planning framework.

In delivering the services, close cooperation between EPF, the tenderer, and EPF member in Poland will be needed.

**2.6 Translation**

The tasks will be carried out in Polish.

However, interaction with EPF will require that some documentation be translated into English and vice-versa. The several options are possible:

1. The tenderer will translate all documentation required
2. The tenderer will translate part of the documentation and the other part is sub-contracted to an external translator
3. The tenderer sub-contracts an external translator for all documentation.

Costs for translation have to be included in the tender price offer. The following is an overview of the documentation that will require translation (the number of pages indicated is an approximation).

These documents have to be revised and approved by EPF before the production of the same documentation for the remaining 4 organisations can start.

|  |  |
| --- | --- |
| **Document** | **Number of pages** |
| Organisational capacity assessment tool | N/A |
| Situation analysis of 2 organisations | 2-3 |
| Report on strategic plan meeting of 2 organisations | 6-8 |
| Strategic Plans – Draft version of 2 organisations | 8-10 |
| Strategic Plans – Final version of 6 organisations | 8-10 |
| Draft analysis of organisational capacity needs + Recommendations for training for 2 organisations | 8-10 |
| Final analysis of organisational capacity needs + Recommendations for training for 6 organisations | 8-10 |

1. **Participation in the tendering procedure and Selection Criteria**

Participation is open on equal terms to all natural and legal persons who respond to the following selection criteria:

* Knowledge of Polish at mother-tongue level
* Working knowledge of English
* Expertise in assessing organisational capacity
* Expertise in conducting strategic planning processes
* Expertise in organisational development
* Working in/with the non-profit sector

Preference will be given to those who can also prove experience in:

* Working with patient organisations

The selection will be done based on expertise (80%) and price (20%).

The tenderer is requested to propose a team of experts (minimum of 2) since the job cannot be carried out by a single person.

1. **Volume of contract**

The maximum contract price is EUR 12 700 including fees; travel and subsistence expenses and VAT.

The duration of the tasks is 7 months. The minimum total number of days for the service is 60.

1. **Price**

Prices must be fixed amounts in Euro.

The amount of VAT should be shown separately.

Estimated travel, subsistence and translation expenses must be indicated separately.

1. **Terms of payment**

An interim payment corresponding to 20% of the contract value agreed with the winning tenderer will be released by EPF upon completion of **Tasks 1, 2, 3** and receipt of the following:

* Strategic Planning Framework
* Organisational capacity needs’ assessment tool in Polish
* 6 Situational analyses
* Invoice

A second interim payment corresponding to 30% of the contract value agreed with the winning tenderer will be released by EPF upon completion of **Tasks 4** and receipt of the following:

* 6 Strategic Plan meetings reports
* Invoice

A final balance payment will be released by EPF upon completion of **Tasks 5 and 6** and receipt of the following:

* 6 Strategic Plans reflecting the Framework agreed with EPF
* Analysis of organisational capacity needs for 6 organisations – the analysis will include clear recommendations for training modules to be run as from 2014
* Invoice

Reimbursements for travel: reimbursements will be done by EPF based on reimbursement requests accompanied by original receipts of travel and subsistence expenses.

1. **Tender submission**

Tenderers should submit the following documents:

* Tender submission form
* CVs
* 3 references with full contact details
* Examples of strategic plans and organisational capacity assessments performed.

|  |
| --- |
| **The offer should be submitted in English by the 12th of April 2013 to Mr Walter Atzori** [**walter.atzori@eu-patient.eu**](mailto:walter.atzori@eu-patient.eu) **and to Ms Sara Bensaude De Castro Freire** [**sara.bensaude@eu-patient.eu**](mailto:sara.bensaude@eu-patient.eu) **in cc.** |

**Annex I**

**Tender submission form**

**CAPACITY BUILDING PROGRAMME FOR PATIENT ORGANISATIONS**

*Please fill in the form in English and leave the irrelevant parts blank. One signed original of this form must be submitted.*

**1.1 In case of a single tenderer**

The tender is submitted by

|  |  |
| --- | --- |
| **Name of the tenderer[[1]](#footnote-1)** |  |
| **Address** |  |
| **City** |  |
| **Postcode** |  |
| **Country** |  |
| **Website** |  |
| **E-mail** |  |

The contact person for this tender is

|  |  |
| --- | --- |
| **Name** |  |
| **Position/function** |  |
| **Office address** |  |
| **Telephone** |  |
| **Fax** |  |
| **E-mail** |  |

The person authorised to represent the tenderer and to sign the contract is

|  |  |
| --- | --- |
| **Name** |  |
| **Position/function** |  |
| **Office address** |  |
| **Telephone** |  |
| **Fax** |  |
| **E-mail** |  |

**2. description of offer**

*2.1 Technical part*

*2.2 Financial part*

|  |  |
| --- | --- |
| **Signature** |  |
| **Name** |  |
| **Date** |  |

1. Please indicate the official name of the company/organisation/institution etc.

   Only if the tenderer is a natural person indicate his/her name: in this case the information for ‘contact person’ and for the ‘person authorised to represent the tenderer and to sign the contract’ must be left blank. [↑](#footnote-ref-1)