

EPF Capacity Building Programme

BULGARIA

Call for Tenders

Fundraising

for 15 Bulgarian Patient Organisations

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 **EPF Capacity Building Programme (CBP)** was launched in 2012 with the overall objective of empowering patient advocates and patient organisations and support them in their effort to promote better access to high quality healthcare for patients. Since 2012, the CBP has been implemented in Bulgaria, Hungary, Romania, and Slovakia offering blended training modules in areas such as strategic and operational planning, fundraising, advocacy, and strategic communication. In each country, the programme supports EPF's full-members which are national cross-disease patient coalitions, and their members' organisations in strengthening their organisational capacity and growing to become equal partners in the national healthcare environment.

The present call for tenders refers to the delivery of the third Capacity Building module in Bulgaria. This year's programme will provide the opportunity for representatives of patients' organisations to be trained in one of the most important activities for NGOs which is the fundraising and mobilizing resources. It is widely recognized that patient organisations face many problems and obstacles in their daily organisational work due to the lack of financing and/or insufficiency of management capacities to implement funded projects. Very often and for the most part, patients' organisations are heavily dependent on donations provided by the pharmaceutical industry. There is a great need for

diversifying the sources of income which would allow patients organisations to achieve a greater level of sustainability and independence. Thus, the aim of this capacity building module is to comprehensively address these issues, and to support patients' organisations to conduct the fundraising in an accountable and transparent manner.

2. Purpose and Nature of Services

The purpose and nature of the services is to support, through trainings and coaching, around fifteen (15) patients' organisations in: **Fundraising**

Specifically, the programme targets following organisations:

- EPF member in Bulgaria the National Patient Organisation (NPO),
- A cross-section of the NPO membership
- other Bulgarian patients' organisations not affiliated with NPO who have expressed an interest in participating in the EPF Capacity Building Programme.

Objectives

- To improve participants' understanding of the concept of fundraising & sustainable fundraising, as well as of the organisational capacities that are needed to sustain fundraising
- To improve participants' knowledge and skills in fundraising and financial management in an accountable and transparent manner
- To strengthen participants' knowledge about the diversity of funding sources and forms of funding (ex.: membership fees, sponsorships and the focus on grants)
- To support participants in developing the fundraising strategies (2-3 years long) and action plans in accordance with their overall strategic orientations and priority activities
- To enhance the quality of patients' organisations project proposals (if applicable)

The module also aims, especially for the organisations who have a genuine interest to increase their knowledge in how to Assess EU Funding Opportunities, to:

- Comprehensively present the EU funding instruments and programmes available at the EU and specially at the national level to which patients organisations may be eligible to apply, in accordance with their strategic objectives
- Explain the same general requirements that apply to each EU grants (ex.: call for proposal, contracting, procurements, co-financing etc.) and how they can self-critically apply it in the context of their own organisations

Outputs

By the end of the programme, following outputs will be delivered by participating organisations, with the support of local experts:

- 30 (two participants per each organisation) pre and post-tests that demonstrate an increase of knowledge in fundraising

- 15 self-assessment questionnaires/tools completed on how they can improve their fundraising and financial transparency practices
- 15 fundraising strategies developed that suit their organisational abilities and external fundraising opportunities
- 15 fundraising action plans developed
- 15 mini-coaching projects
- At least 1 funding proposal is explored in depth and submitted for funding either to national or EU level institutions (ex.: NPO).

Outcomes

By the end of the training module:

- Participants feel more confident and resourceful in terms of fundraising
- Participating organisations are encouraged to maintain the good relationship with current donors while being committed to financial transparency
- Participating organisations feel engaged to implement their fundraising strategies in an organized and systematic manner on a mid-term basis

By the end of 2017, at least 50% of the total number of participating organisations will have increased fundraising income as measured by the comparison of their annual financial reports.

This training module will be delivered in Bulgarian language.

2.1 Methodology

This section outlines the proposed methodology for the delivery of the third module of the capacity building programme in Bulgaria. The precise and detailed methodology will be proposed by tenderers as part of their bid and will be further defined and agreed upon further to discussions with EPF.

The training methodology shall take into consideration the different natures of the organisations that participate in the training module, namely their stages of development, size, and membership base, and their different fundraising aims. 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 coaching.

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.

i. Baseline Assessment

The assessment will be conducted at the beginning of the module. Its purpose is to assess participating organisations' current knowledge-base, skills and experiences in the area of fundraising in order to also inform the content of the training. The assessment should be conducted in a close collaboration with the EPF and FPP staff in order to obtain a comprehensive picture about each participating

organisation. The assessment report should include a clear set of recommended measures on how the organisations can improve their fundraising capacities which would be addressed by the local experts during the face-to-face trainings and coaching phase.

ii. 1st Face-to-face training

The section 2. of this document that focuses on objectives, outputs and outcomes should be used as a basis for developing learning objectives and detailed methodology for the 1st face-to-face training over two days' training.

Suggested methodology: presentations & presentation handouts, plenary sessions, individual and group exercises, practical tools, additional resources etc.

By the end of the training, each patient organisation will specify area in which they require a coaching support i.e. mini-coaching project, and how they prefer to collaborate with the local experts.

iii. Coaching

In-between the two face-to-face trainings, the trainers shall provide coaching and mentoring, individual support and advices to each participating organisation in terms of implementing their fundraising strategies, action plans and mini-coaching projects. The coaching phase should help participants become more confident and skilful in fundraising. The coaching part will ideally take place in the office of an organisation to allow a detailed and dedicated work. The local experts will be obliged to provide a progress report on a monthly basis.

iv. Second face-to-face training

While the first face-to-face will be organized at the beginning of the capacity building programme, the follow-up training will be organised once the coaching phase is completed. Its purpose is:

- To explore the new topics, if needed.
- To explain topics that were not sufficiently explored during the first face-to-face training.
- To give the opportunity to participating organisations to present and discuss the implementation of their fundraising strategies, plans and mini-coaching projects and what they have achieved so far.
- To gather successful projects as a result of a coaching phase which will be disseminated on the EPF website.

Each training should be followed by the comprehensive evaluation.

The final evaluation will be conducted by EPF at the end of the follow-up training. EPF will use this opportunity to ask participants about the topics for the next capacity building programme, including their satisfaction with the provided support.

v. Final Coaching and completion of the module

Following the 2nd face to face training, the organisations should integrate feedback and some comments collected during the training that might have been overlooked during the initial coaching phase. At the same time, the local experts will continue to provide a support to patient organisations.

This would facilitate a finalization of their mini-coaching projects on which they have been engaged on, as well as a dissemination of successful projects on EPF website.

Based on this suggested methodology, the tenderers should provide detailed explanations and evidence in how they will meet these specifications.

2.3 Tasks and Deliverables

The successful tenderer shall deliver following deliverables based on the following tasks:

Task	Task Description	Days	Deliverables Description	Estimated Due Date
T(II)1	Conduct the assessment ('Audit') of the use of current fundraising capacities, with the focus on the website, of each participating organisations – (approx.: 5 org per day, plus reporting) (15 organisations in total) – According to EPF methodology	7 days	A comprehensive report which shows what are the fundraising practices of each participating organisation, and a set of recommended measures to be addressed during the trainings and coaching phase.	30 days after the signing the contract
T(II)2	Design a training methodology, and develop training materials, including comprehensive presentations, developed tools and exercises to be used during the first face-to-face training in Fundraising	5 days	Training agenda with a detailed description of learning objectives, topics, teaching approach and methodology, including comprehensive presentations and tools, where required (ex.: Assessing EU Funding Opportunities)	At least 5 days before the delivery of the training for EPF's approval and recommendations
T(II)3	Deliver the 1 st face-to-face training for all participating organisations in Sofia involving at least 1 representative per organisation (no more than 24 participants in total, in duration of 2 days)	5 days	Draft Fundraising strategies and plans for each participating organisation (15 in total), including a list of mini-coaching projects (to be submitted jointly with the training report)	60 days after signing the contract

T(II)4	Write the comprehensive training report of the 1 st face-to-face training	3 days	A comprehensive report of the first face-to-face training, including a description of presented and discussed topics, used methodology, participants' engagement, main outcomes, key issues/challenges faced during the training, including the recommendations, as well as an evaluation.	Max. 5 days after the training is delivered
T(I)5	Follow-up by means of mentoring/coaching/working together with each organisation to support them throughout the further development, implementation and finalisation of the fundraising strategy, plan and some mini-coaching fundraising project during which they may need a support in fundraising (approximately 2 days per each organisation)	30 days	Monthly progress report including an outline of a coaching plan, time and support provided, key issues and challenges, recommendations for each participating organisation – Reporting template to be discussed with EPF	On a monthly basis (preferably on 25 th of each month dedicated for the coaching phase)
T(II)2	Design a training methodology, and develop training materials to be used during the 2 nd face-to-face training in Fundraising	4 days	Training agenda with a detailed description of learning objectives, topics, teaching approach and methodology	At least 2 days before the delivery of the training for EPF's approval and recommendations
T(II)3	Deliver the 2 nd face-to-face training for all participating organisations in Sofia involving at least 1 representative per organisation (no more than 24 participants in total)	3 days	A presentation of strategies, action plans and coaching projects of each participating organisation and major accomplishments that can be used as 'good practices' and shared	30 days before the end of contract

			with other EPF member organisations through website (to be submitted jointly with the training report)	
T(II)4	Write the comprehensive training report of the 2 nd face-to-face training	3 days	A comprehensive report of the second face to face training, including a description of presented and discussed topics, used methodology, participants' engagement, main outcomes, key issues/challenges faced during the training, including the recommendations, as well as a short evaluation.	15 days before the end of contract
In total days: 60 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 the first half of January 2016.

January – February 2017	Assessment
February 2017	1st Face-to-Face training
February – May 2017	Coaching
May – June 2017	Follow-up Training and Coaching Finalisation
June 2017	EPF Evaluation

3. Volume of contract

The maximum contract price is EUR 13.000 including fees, administrative overheads and VAT.

The duration of the assignment is around 6 months. The minimum total number of days for the service is 60.

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		
Qualitative criteria 1:	Relevance of the experience and expertise of the proposed team to the Fundraising as well as	25 points

	Accessing EU Funding Opportunities, including their assigned roles	
Qualitative criteria 2:	Understanding of the nature and purpose of this service by focusing on patient organisations' capacity building needs in Fundraising in its current context	25 points
Qualitative criteria 3:	Relevance, feasibility and quality of the detailed methodology proposed, including the work plan	25 points
Qualitative 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 June 2017.

Tender submission and schedule of the work are as follows:

Launch Tender	EPF	08.12.2016
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Close of the Tender	Tenderer	03.01.2017
Selection of the tenderer	EPF	06.01.2016
Briefing meeting/Signature of the Contract	EPF - Tenderer	12-16.01.2017

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

Annex: SAMPLE Training Methodology

Theoretical part	Suggested practical part
Presentation: What is the difference between the fundraising and sustainable fundraising?	Discussion: Patient organisations' past and current experiences in terms of maintaining a good relationship with donors
Presentation: Why having additional capacities such as the general management and financial management is needed for sustainable fundraising? What does it mean to act in an accountable and transparent manner, and how much is that important to potential donors?	Self-assessment: What are patient organisation's current strengths and weaknesses in terms of fundraising? Discussion: How far are patient organisations from the ideal situation in terms of compliance with the financial transparency norms and standards? Exercise/Tool: How they can improve it?
Comprehensive presentation: A diversity of the fundraising sources, and fundraising activities	Exercise/Tool: How patient organisation are currently fundraising? What are patient organisations' most critical fundraising needs? What are patient organisations' desired fundraising activities and/or project ideas?

<p>Comprehensive presentation: The EU funding instruments and programmes at the EU and specifically at the national level for which patients' organisations may be eligible</p>	<p>Discussion/Q&A questions</p>
<p>Presentation: The EU requirements that apply to each EU grants/Specific requirements of the operating grants available at the national level</p>	<p>Exercise: Evaluate a submitted funding proposal from a point of view of the EU evaluator (real case studies)</p> <p>Self-assessment: Assess patient organisations capacities and how they comply with the general EU grant requirements</p>
<p>Presentation: What is a fundraising strategy, and how to develop it?</p>	<p>Exercise: Based on patient organisations' strategic plan and fundraising needs, each patient organisation should develop a fundraising strategy (a strategy should contain at least a description of the desired activity or a project idea that needs to be fundraised, a rough estimation of costs, a possible source of funding and suggested implementation period needed for both fundraising and activity implementation)</p>
<p>Presentation: What is a fundraising action plan, and how to develop it?</p>	<p>Exercise: Based on their fundraising strategies, each patient organisation should develop the fundraising action plan (an action plan should contain at least a fundraising activity/project idea, a person responsible for fundraising, needed resources, and time).</p>