

EPF Capacity Building Programme Slovakia Call for Tenders

Training Module on presentation and negotiation skills, advocacy,
campaigning, and media relations for 15 to 18 Slovakian Patient
Organisations

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1. Purpose of the tender

The purpose and nature of the services is to deliver a capacity building training module focussing on presentation and negotiation skills, advocacy, campaigning and media relations to 15 to 18 Slovakian patient organisations (approximately 25 individual participants regardless of the actual number of organisations involved).

The training module shall be delivered as a blended face-to-face and remote coaching. The assignment also include assistance to each organisation in developing a project of their choice with a view to translating into practice the theoretical knowledge acquired during the training module.

2. Background and general Information about EPF and AOPP

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, and. 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.

EPF launched a Capacity Building Programme (CBP) in 2012 with the overall objective of strengthening the capacity of its membership by enabling both national and European level patients' organisations to be more effective in achieving their objectives and aspirations. The CBP also allows our membership to feed their experiences and expertise into the work of EPF and utilise the outcomes of our collective work in a national, and/ or disease specific context.

On a national level the CBP is currently implemented in six countries, i.e. Romania, Bulgaria, Slovakia, Hungary, Cyprus, and Poland, involving 50 patient organisations globally. The CBP is also targeting pan-European patient organisations and members of EPF through dedicated thematic training modules.

The EPF Capacity Building Programme is funded by unrestricted grants from different pharmaceutical companies who are committed to supporting the empowerment of the patient community across Europe by strengthening the capacity of patient organisations. The Slovak Association of Innovative Pharmaceutical Companies (AIFP) also provides financial contribution to the programme in Slovakia. AIFP have themselves delivered a capacity building module for Slovak patient organisations in 2015 consisting of 5 full days of workshops covering the following themes: 1. Patients and the Healthcare System; 2. Fundraising; 3. Strategic planning; 4. Advocacy programme; 5. Media on the patient's side.

With a view to offering one strong capacity building programme for patient organisations in Slovakia and avoid duplication of efforts, as from 2016 AIFP have agreed to support the EPF programme and working transparently and in partnership with EPF and EPF Slovak member AOPP.

AOPP, *Asociácia na Ochranu Práv Pacientov* is the national coalition of patient organisations in Slovakia. Apart from being a beneficiary of the programme, AOPP has been actively supporting EPF in coordinating the Capacity Building Programme in Slovakia.

The present call for tenders refers to the delivery of the third phase of the CBP in Slovakia. The first phase of the programme was launched in late 2013 and covered training on strategic planning and needs assessment. The second phase of the programme, launched in 2015, was dedicated to fundraising.

The training module has been jointly designed and will be delivered jointly by EPF and AOPP with EPF taking the leading role. AIFP will contribute to this endeavour by providing support and expertise.

The EPF Capacity Building Programme is coordinated by EPF Director of Programmes and Operations Mr Walter Atzori. The contact person within AOPP is Mr Dominik Tomek.

3. Description of services

The purpose and nature of the services is to deliver training and coaching on presentation and negotiation skills, as well as advocacy, campaigning and media relations to 15 to 18 Slovakian patient organisations and assist them in developing a project of their choice for their organisation.

This training programme will be delivered in the Slovakian language. Communication with EPF will be in English.

3.1 Training module objectives and learning outcomes

The overall objective of this training module is to strengthen the capacity of 15 to 18 Slovakian organisations in presentation and negotiation skills, as well as advocacy, campaigning and media relations.

The training module activities will build on work initiated in Phase I and II of the EPF CBP in Slovakia, as well as training workshops implemented by AIFP in 2015, to provide participants with an opportunity to experience different techniques, and train a set of very practical skills and methods to support their on-going work.

By the end of this training module, the participating organisations will have developed skills related to:

- Presentation skills: practical tools and methods to improve presentation skills
- Negotiation skills: negotiation techniques to effectively liaise with donors and partners, such as the Ministry of Health and/or health insurance companies
- Campaigning: methods and tools to design effective and successful campaigns and to evaluate their impact
- Advocacy: advocacy tools and methods to implement effective activities and reach organisational goals
- Media relations: techniques to develop targeted messaging for the media (print, TV and radio), as well as decision-makers, and to use different tools (e.g. when and how to use press conferences, press releases etc.)

- Ethics and transparency: the role and importance of ethical and transparency frameworks in planning and implementing activities
- Defining and developing a project covering one or more of the above mentioned areas

The following outcomes are expected to have occurred by the end of this training module:

- Total of 25 patient representatives trained who are capable of applying their skills within their own organisations and transfer knowledge acquired to their colleagues
- 15 to 18 projects covering one or more of the areas identified in this section developed - depending on the actual number of organisations involved

3.2 Training module methodology

This section outlines the proposed methodology for the delivery of this training module in Slovakia. The training module will consist of a blend of in-person training and remote coaching and support, covering the topics identified under section 3.1 i.e. presentation and negotiation skills, advocacy, campaigning and media relations. The precise 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 nature and starting level of the organisations involved in the programme, namely their stages of development, size, and membership base, and their different approaches to work and strategic plans.

I. BASELINE ASSESSMENT

The purpose of the baselines assessment is three-fold:

- To assess the current knowledge-base, skills and experience of participants so that the programme can be built taking into account the baseline.
- To assess the organisations' past experience in areas covered by the training (please see section 3.1). This task will be delivered by participants as part of the training.
- To help organisations identifying a project to be developed and implemented after the first face-to-face training.

II. IN-PERSON TRAINING

At least, two in-person training sessions will be organised.

The proposed training will strike a balance between theoretical frameworks, and opportunities to train practical skills as well as a wide range of tools, methods and approaches.

III. COACHING

The training expert/s will provide individual coaching to the 15 to 18 organisations in-between the two in-person training in order to support them with the development of their project of choice.

The coaching will be delivered both at distance and via face-to-face meetings with the organisations. Apart from the weekly distance support, the expert/s shall be available for a visit at the organisation to facilitate a meeting for elaborating their project.

Depending on the length of the initial training and based on the identified support needs, the expert/s could spend additional time with each organisation or organise additional small group meetings to maximise opportunities for learning and cross-fertilisation. This will give organisations the opportunity to address more practical aspects, specific to each organisation, and will support the development and implementation of their project.

The consultant's role is to give feedback on processes and documents with the aim to:

- correlate the project and proposed approaches to the organisation's objectives
- advise on strategies and techniques that are most appropriate for the organisation
- provide advice and support in relation to potential projects to be developed by the organisation following the first face-to-face training
- integrate certain key information collected during the baseline assessment that might have been overlooked by the organisations
- further support the best use of available tools.

During the coaching period each organisation, through the individual(s) who attended the training session, will communicate weekly with the expert to report upon the stage of defining the project plan and approach.

Each organisation will be responsible for developing a project under the leadership of the individual involved in the training session whom will be supported by a small working group of other organisation's representatives.

3.3 Tasks, deliverables and timeline

The successful tenderer shall implement the following Tasks:

Task	Description
T1	Establishing a baseline assessment of the capacity of the participating organisations on the areas identified under section 3.1 and their representatives who will undergo the training
T2	Designing a training module covering the areas identified under section 3.1 which shall include a syllabus outlining the topics to be included in the training, teaching methodology approach, and material to be used
T3	Agreeing on a project to be developed and implemented by the organisation
T4	Developing training material on the training areas identified under section 3.1 to be used during the face to face training and the coaching phase.
T5	Delivery of the first face training involving one/two representatives per organisation
T6	Follow-up by means of mentoring/coaching/working together with each organisation to support them throughout the elaboration and development of a dedicated project.
T8	Delivery of a second face-to-face training at the end of the coaching phase (2 – 3 days).

The successful tenderer shall deliver the following deliverables:

Deliverable	Description
D1	Report on baseline assessment of the capacity and needs of participating organisations and individuals in the areas covered under section 3.1
D2	Outline of training module showing clear link with learning outcomes, a syllabus outlining the topics to be included in the training, teaching methodology approach, and material to be used
D3	Training material/resources to be used during the two face-to-face events and mentoring/coaching training
D4	List of the projects selected by the various organisations
D5	Short report of the kick-off face to face training including participant list, agenda, main outcomes, follow-up and key issues/challenges faced during the training as well as evaluation
D6.1 – D6.18	15 to 18 project outlines developed depending on the actual number of organisations
D7	Short report of the second face to face training including participant list, agenda, main outcomes, follow-up and key issues/challenges faced during the training
D8.1 – D8.18	15 to 18 project outlines developed by the end of the module, depending on the actual number of organisations

D1-D2, D4-D5 and D7 shall be submitted in English language.

The proposed timeframe for this contract, assuming the contract is signed on 25 July 2016, is as follows:

Mid-August 2016	Review and finalisation of overall methodology
Mid-September 2016	Baseline assessment
October 2016	First in-person training
September-November 2016	Coaching phase
January 2017	Second in-person training
January-February 2017	Coaching phase

March 2017	End of module and delivery of final project outlines
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4. Participation in the tendering procedure

4.1. 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.

4.2. 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 expertise (80%) and price (20%).

All applicants will receive acknowledgement of receipt of their tender and will be informed of the outcomes of the selection process within 5 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:

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

- Native-level knowledge of the Slovakian language
- Very good working knowledge of English
- Strong expertise in the areas identified under section 3.1
- Expertise in planning and implementing training
- Expertise in coaching organisations

Preference will be given to tenderers that:

- Can also prove experience in the areas identified under section 3.1 for the non-profit sector
- Can also prove experience working with and/or delivering training to patient organisations
- Will propose to implement the programme in a team of at least two people.

4.3. 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.

4.4. Schedule

The assignment shall start as from the date of signature of both contracting parties and shall be completed by 15 March 2017.

Tender submission and schedule:

Launch Tender	EPF	Friday 24 June 2016
Close of the Tender	Tenderer	Tuesday 19 July 2016
Selection of the tenderer	EPF	Friday 22 July 2016
Briefing meeting	EPF - Tenderer	to be determined

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.

The maximum contract price is:

- EUR 11.000 including fees, administrative overheads and VAT if the number of organisations involved is 15
- EUR 13.000 including fees, administrative overheads and VAT if the number of organisations involved is 18

The duration of the assignment is 7 months. The minimum total number of days for the service is:

- 50 if the number of organisations involved is 15
- 62 if the number of organisations involved is 18

Travel and subsistence costs linked to travel will be covered in addition to the above-mentioned value.

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 Walter Atzori at EPF 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

Belgium

www.eu-patient.eu

10. Submission

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 in English by Tuesday 19 July 2016 to Walter Atzori at walter.atzori@eu-patient.eu.