**EPF Capacity Building Programme**

**ROMANIA**

Call for Tenders

**Strategic Planning, Mid-term review of Strategic Plans and Training on Strategic Communication for 16 to 18 Romanian Patient Organisations**

# 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** was launched in 2012 to support the development of organisational and advocacy capacity of both national and European level patients’ organisations. The current CBP is being implemented in Bulgaria, Hungary, Poland, Romania and Slovakia, with the plan to expand its reach to the Western Balkan region in 2017.

In Romania, the CBP was provided to ten (10) Romanian organisations mainly members of EPF’s full member organisation COPAC (Coalition of Patients’ Organisations with Chronic Diseases in Romania). The programme included the implementation of the Phase I - Strategic planning in 2012, and the Phase II - Operational planning in 2013. For most of the organisations this was the first time a strategic plan was developed. During the evaluation of the Phase I and II, it was reported that the strategic and operational planning helped patients’ organisations to become more structured and organized. It was also suggested to conduct a mid-term review of the strategic plans after a certain implementation period. As a part of the Phase II evaluation, the training needs assessment identified building capacities in fundraising as a priority capacity building need, which was only partly implemented in 2015 during the CBP Phase III. The current CBP Phase IV is targeting COPAC’s 10 member organisations who already developed their strategic plans, and expand its support to new COPAC’s member organisations and other eligible patients’ organisations not affiliated to COPAC.

# Purpose and Nature of Services

The purpose and nature of the services is to support patients’ organisations in development of strategic plans for the first time, mid-term review of Strategic Plans and delivery of trainings and coaching on strategic communication. The programme targets from 16 to 18 patients’ organisations.

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

By the end of this capacity building programme, the participating organisations will have developed both individual and organisation capacities in the following areas:

## Strategic Planning and Mid-Term Review of the Strategic Plans

## Objectives

Following the strategic planning process in 2012, the mid-term review aims to provide each participating organisation the opportunity to assess progress being made towards achieving their mission and strategic goals, as well as to identify any implementation areas that might require realignment and/or adjustments of either strategic goals, objectives, key actions and/or performance indicators. The mid-term review will also allow organisations to reflect on the changing external environment and assess whether there is a need to change certain strategies and/or actions.

This part of the programme also aims to support developing Strategic Plans of those organisations who did not take part in our Phase I and II.

**Output and Outcomes**

By the end of this activity, the local experts are expected to produce a Mid-term review report for each participating organisation and to include recommendations for COPAC. By the end of the CBP, each participating organization will have developed or reviewed its Strategic Plans. The revised strategic plans should incorporate strategic communication and fundraising plans, where appropriate. On a long run, it is expected that having strategic plans will help patients’ organisations to become stronger and more resilient to changes.

## Strategic communication

The strategic communication is an integral component of organization’s long-term plans, and it is increasingly important element of the public health advocacy organizations to ensure that strategically focused message is reaching a targeted audience (ex.: decision-makers) and other stakeholders (ex.: partner organizations, donors). The strategic communication also contributes to the achievement of their organizations’ mission and specific advocacy objectives.

## Objectives

The objectives of the strategic communication capacity building component, including baseline assessment, face-to-face trainings and coaching, are, as follows:

* To understand the concept of strategic communication
* To undertake a (self)assessment of their current communication (ex.: communication tools, targeted audience, messages etc.), to identify capacity gaps and propose measures for improvements
* To develop a communication strategy (or simplified plans, where more appropriate), and/or internal policies and procedures, in line with participating organizations’ assessed capacities, priorities and resources
* To understand the importance of different communication skills e.g. written, oral, as well as strategically structured messages for liaising and maintaining the partnerships with different stakeholders
* To strengthen participants’ understanding of various communication tools (their characteristics, pros and cons, their relevance to increase the visibility and to reach targeted audience and other stakeholders) in a strategic manner
* To encourage transparent and ethical communication within each participating organization
* To use strategic communication to underpin their fundraising efforts
* To support organizations in their efforts to use communication skills acquired and techniques learned during the training to be implement more effective fundraising strategies

## Outcomes

By the end of the strategic communication capacity building programme component:

* At least 1 member of each organization has improved knowledge and skills about strategic communication (ex.: have clear direction about their short and mid-term communication strategies, can create strategic focused messages, or engage confidently in online social media), and is capable of sharing the newly acquired knowledge within their organisation.
* Each participating organisation has developed, fundraised and implemented communication projects, in accordance with their revised strategic plans strategic communication strategies.

# Methodology

This section outlines the proposed methodology for the delivery of this capacity building programme in Romania. 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, namely their stages of development, size, and membership base, and their different fundraising aims. The proposed methodology will reflect these differences.

The proposed training will also attempt to strike a balance between theoretical frameworks and the practical aspects through coaching.

## Strategic Planning and Mid-Term Review of the Strategic Plans

**- Workshop to conduct Mid-Term Review of existing Strategic Plans**

Following the EPF’s Kick-off meeting, two representatives from each participating organization, with the previous experience in developing Strategic Plans, will have the opportunity to take part in the workshop ‘Mid-Term review of Strategic Plans’. This workshop will help the representatives not only to build a greater understanding about the importance of monitoring and review of the strategic plans, but also to use this time to conduct the mid-term review of their strategic plans.

* **Support new COPAC’s member organisations in development of Strategic Plans**

## The local experts will support new COPAC’s member organizations in development of Strategic Plans via at least one day-long individual support. The local experts can suggest the methodology in how to support new organisations this process. Taken into consideration the size and capacities of new organisations, expert can recommend a development of simplified plans, and provide concrete tips and advices to organisations in how they can improve their strategic thinking and planning.

## Strategic communication

1. **Assessment**

The assessment should be conducted at the beginning of the capacity building component. Its purpose is to assess the current strategic communication related knowledge-base, skills and experience of participants. The local experts can consider the use of self-assessment methodology.

Based on the assessment of organizations’ communication capacities, participants with the help of the local experts, should identify gaps in organization’s daily communication work, and then, propose a set of concrete measures for improvement of their capacities. The assessment results should be used for designing of training modules as well as during the coaching phase. At the same time, the assessment results can help organisations to identify a specific communication project that will be further developed and implemented during the coaching phase.

1. **Face-to-face trainings**

## Two (2) face-to face training sessions will be organised.

## What is preferable methodology for the 1st face-to-face trainings? The first face-to-face training will be delivered to those participants who are directly or indirectly responsible or show an interest to work on the communication issues within the organisation. Its intention is to explain the importance of communication (ex.: difference between basic and strategic communication), key communication concepts and to discuss the latest communication issues and topics. In addition to the presentations, the trainings will include stimulating activities in the form of individual and group work, discussions, case-studies, or role-play exercises. If available, a communication expert working in non-for-profit sector (preferably in the public health sector at the national level) is encouraged to attend as a speaker and share their professional experiences.

## What is the preferable methodology for the 2nd face-to-face training?While the first face-to-face will be organized at the beginning of the capacity building programme, the second face-to-face training will be organised once the coaching phase is completed. As such, the objective of the second face-to-face training is to clarify any new topic (ex.: internal communication, engagement with journalists, crisis media engagement etc.) that was not sufficiently explored during the first face-to-face training. The topics that were presented during the first face-to-face training can be explored in depth, if needed. Also, each participating organization will have the opportunity to present their communication strategies, plans and/or specific communication projects, and what they have been working on during the coaching phase. The second face-to-face training aims to gather best practice cases from each participating organization.

1. **Coaching**

After the first face-to-face training session, the local experts will provide individual coaching sessions to each participating organisation in order to support them in identifying communication approaches that best suit the context in which organisations function.

The local experts’ role is to give feedback on processes and documents with the aim to:

* correlate the communication approach and plan to the organisation’s objectives
* advise on strategies and techniques that are most appropriate for the organisation
* integrate certain capacity gaps collected during the (self)assessment and support the organization to implement identified measures
* provide advice and support to develop, implement and fundraising for at least one communication projects/campaigns
* further support the best use of available communication tools.

The coaching will be delivered both at distance and via face-to-face meetings with each participating organisation at the weekly basis. Depending on the identified areas of support, the expert/s could spend additional time with each organisation and/or organise additional small group meetings to maximize opportunities for learning and sharing of best practices. This will give organisations the opportunity to address more practical aspects, specific to each organisation, and will support the implementation of the communication capacity building plan or specific project.

# 2.3 Tasks

The successful tenderer shall implement the following Tasks:

## Strategic Planning and Mid-Term Review of the Strategic Plans

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| **Task**  | **Description**  |
| **T(I)1** | Conducting a workshop with participating organisations to review progress and identify areas that need re-alignment |
| **T(I)2** | Follow-up by means of mentoring/coaching/working together with new organisations to support them throughout the development of new strategic plans. |
| **T(I)3** | Provide recommendations about the next phase for all organisations |
| Total of Days: 30 days |

## Strategic communication

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| **Task**  | **Description**  |
| **T(II)1** | Conducting a (self) assessment of the communication capacity of the participating organizations and their representatives who will undergo the training and coaching |
| **T(II)2** | Designing a training module on strategic communication which shall include a syllabus outlining the topics to be included in the training, teaching methodology approach, and material to be used |
| **T(II)3** | Developing training material on strategic communication to be used during the first face to face training  |
| **T(II)4** | Delivery of a first 2-3 days’ face to face training in Bucarest or in other approved location involving 1 participant per each organisationAgreeing on a communication project to be developed and implemented by each of the participating organisations |
| **T(II)5** | Designing a concept for the coaching component with elements common to all organisations and an organisation-specific part following the training  |
| **T(II)6** | Follow-up by means of mentoring/coaching/working together with each organisation to support them throughout the elaboration of a communication strategy and fundraising, development and implementation of a communication project plan. |
| **T(II)7** | Designing a training module on strategic communication which shall include a syllabus outlining the topics to be included in the 2nd face-to-face training, teaching methodology approach, and material to be used |
| **T(II)8** | Developing training material on strategic communication to be used during the second face to face training  |
| **T(II)9** | Delivery of a second 1-2-day face to face training in Bucarest or in other approved location involving 1 representative per organisation |
| **T(II)10** | Providing final recommendations for each communication project and share them with EPF (best practices, communication, reporting, etc.) |
| **TOT person/days: 40** |

# 2.4. Deliverables

The successful tenderer shall deliver the following deliverables:

## Strategic Planning and Mid-Term Review of the Strategic Plans

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| --- | --- | --- | --- |
| **Task** | **Description** | **Deliverable** | **Description** |
| T(I)1 | Conducting a workshop with participating organisations to review progress and identify areas that need re-alignment | D(I)1 | Short report on the workshop, including participants list and other findings Mid-term review of Strategic Plans report (EPF will provide a template)  |
| T(I)2 | Follow-up by means of mentoring/coaching/working together with new organizations to support them throughout the development of new strategic plans. | D(I)2 | Developed Strategic Plans, where appropriateSet of recommendations for each participating organisations |
| T(I)3 | Provide recommendations about the next phase for all organizations | D(I)3 | Set of recommendations about development needs for each participating organisation  |

## Strategic communication

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| --- | --- | --- | --- |
| **Task** | **Description** | **Deliverable** | **Description** |
| T(II)1 | Establishing a capacity assessment of the communication capacity of the participating organisations and their representatives who will undergo the training | D(II)1 | Assessment report of the communication capacity and needs of participating organisations and individuals, as well as agreed set of measures for improvements per organisation |
| T(II)2 | Designing a training module on communication, which shall include a syllabus outlining the topics to be included in the training, teaching methodology approach, and material to be used | D(II)2 | Outline of 1st 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. |
| T(II)3 | Developing training material on strategic communication to be used during the first face to face training | D(II)3 | Training material/resources to be used during the face to face and mentoring/coaching training. |
| T(II)4 | Delivery of a first 2-3 days’ face to face training in Bucarest or in other approved location involving 1 participant per each organisationAgreeing on a communication project to be developed and implemented by each of the participating organisations | D(II)4 | Short report of the two-day face to face trainings including participant list, agenda, main outcomes, follow-up and key issues/challenges faced during the training, as well as a short evaluation |
| T(II)5 | Designing a concept for the coaching component with elements common to all organisations and an organisation-specific, as well as agreeing on a project to be developed and implemented by each of the participating organisation. | D(II)5 | Outline of a concept for the coaching component with elements common to all organisations (part I) and an organisation-specific part (part II). |
| T(II)6 | Follow-up by means of mentoring/coaching/working together with each organisation to support them throughout the elaboration of a communication strategy and fundraising, development and implementation of a communication project plan. | D(II)6 | A Short report outlining ongoing progress, challenges and way to overcome it |
| T(II)7 | Designing a training module on strategic communication which shall include a syllabus outlining the topics to be included in the 2nd face-to-face training, teaching methodology approach, and material to be used | T(II)7 | Outline of 2nd 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. |
| T(II)8 | Developing training material on communication to be used during the second face to face training  | D(II)8 | Training material/resources to be used during the face to face and mentoring/coaching training. |
| T(II)9 | Delivery of a 1-2 days 2nd face to face training in Bucarest or in other approved location involving max. 2 representatives per organisation (9 organisations) | D(II)9 | Short report of the two-day face to face trainings including participant list, agenda, main outcomes, follow-up and key issues/challenges faced during the training, as well as a short evaluation |
| T(II)10 | Presenting and providing final recommendations for each communication project and share them with EPF (best practices, communication, reporting, etc.) | D(II)10 | Outlines of each communication projects and recommendations (if applicable) |

# D3 and D8 do not have to be submitted in English language.

# 2.5. Timeframe

This section of the call for tender outlines the proposed timeframe for this contract assuming the contract be signed on 1 November 2016.

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| **End-November 2016** | Kick off and Workshop on the Mid-Term Review of Strategic Plans |
| **End-December 2016** | Strategic Communication: Assessment |
| **End-January 2017** | 1st Face-to-Face training |
| **December 2016 -May 2017** | Coaching (includes the development of new Strategic Plans) |
| **May 2017** | 2nd Face-to-Face Training |
| **June 2017** | EPF Evaluation |

# Volume of contract

The maximum contract price is EUR 14.000 including fees, administrative overheads and VAT.

The duration of the assignment is 8 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.

# Participation in the tendering procedure

## TENDER SUBMISSION FORM

Tenderers should submit the following documents:

* Tender submission form (Template in Annex I)
* CV/s ok people involved in implementing the Task
* The offer should be submitted to Selena Imerovic Hodzic, Capacity Building Officer, **selena.imerovic@eu-patient.eu**

## 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.

## 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 (75%) and 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:

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| **Qualitative award criteria** |
| **Qualitative criteria 1: expertise in strategic planning, including mid-term reviews of Strategic Plans and strategic communication** |
| **Qualitative criteria 2**: **strong experience in fundraising**  |
| **Qualitative criteria 3**: **expertise in planning and implementing trainings and coaching** |
| **Qualitative criteria 4**: **working experience with patients’ organisations** |

Tenderers may submit their offers for either the first part ‘Strategic Planning/Mid-term review of Strategic Plans’ or only for the second part ‘Strategic Communication’, however please note that the preference will be given to those to tenderers that can prove experience in all needed areas.

Applicants must have excellent knowledge of the English language.

## Exclusion criteria

Candidates or tenderers shall be excluded from participation in this procurement procedure if:

1. 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;
2. they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
3. they have been guilty of grave professional misconduct proven by any means which the EPF can justify;
4. 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;
5. 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;
6. 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.

##  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:

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| --- | --- | --- |
| Launch Tender | EPF | 05.10.2016 |
| Close of the Tender | Tenderer | 20.10.2016 |
| Selection of the tenderer | EPF | 25.10.2016 |
| Briefing meeting | EPF - Tenderer | 28.10.2016 |

# 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.

# Quality issues

In delivering the service the tenderer shall ensure the highest quality standards of which EPF shall be the sole judge.

# 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.

# 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.

The estimated due date for the signature of the contract will be 4th November 2017.

# Contracting authority

European Patients’ Forum (EPF)
Rue du Commerce 31
1000 Brussels
[www.eu-patient.eu](http://www.eu-patient.eu)