

Call for Tender - External Evaluation of the EPF 2017 Work Programme

16/03/2017



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1. Purpose of the tender

Being partly funded by an Operating Grant coming from the European Commission's Health Programme 2014-2020, EPF needs to submit a call for tender on an annual basis to invite interested parties to submit their offers relating to the external evaluation of our Work Programme.

The purpose of this tender is to invite applications to assist the European Patients' Forum (EPF Secretariat) in evaluation activities relating to the implementation of our Annual Work Programme for 2017.

The evaluators are expected to carry out evaluation in respect of the operational objectives set out in the EPF 2017 Work Programme, which are as follows:

OBJECTIVE 1 - Strengthening the patient perspective and impact in EU health-related policy, programmes, and decision-making through evidence-based, results-oriented patient advocacy.

OBJECTIVE 2 - Reinforcing the capacity of patients and patient organisations to contribute effectively to better health and social care for all patients in the EU and enhancing their accountability and mutual solidarity.

In carrying out this evaluation, EPF expects a 360-degree view of the organisation as it has evolved, as it manages its tasks, and as it faces the future.

The EPF 2017 Work Plan

The EPF 2017 Annual Work Plan distinguishes between an Operational Work Programme consisting of all of EPF's 2016 core activities which are co-funded through an **Operating Grant under the EU Public Health Programme**, and the portfolio of projects and programmes running in parallel. These are either projects co-funded by the European Commission under different funding Programmes or other projects/programmes funded by unrestricted funds from sponsors (e.g. the EPF Capacity Building Programme).

Evaluation of EPF Work Programme for 2017

Ongoing evaluation of Annual Work Programme in line with agreed measurable performance indicators and target for each core strategic goal has been intrinsic to EPF developments over the last few years.

EPF regards evaluation as a management tool to systematically and objectively assess the relevance, performance, success, and sustainability of our projects, programmes, as well as our organisation's overall performance. Accordingly, while evaluation is a mandatory requirement for EPF as an organisation receiving an Operating Grant from the EU budget, the main objective of evaluation is to enable effective learning within our organisation by means of evidence-based highlighting of successful and less successful activities, and identification of successful strategies for extension/expansion/replication of current activities and of development of future ones.

EPF is committed to this approach to be able to demonstrate how we do business and how we deliver in the context of the Annual Work Programme in question, but also in order to plan, anticipate, and be as proactive and effective as possible as a fast-growing leading organisation in the EU health policy environment.

2. Tasks

The 2017 evaluation will cover the following areas:

- **EPF Campaign on Access:** since January 2017, EPF is carrying out a flagship campaign on Access to Healthcare that will last until December. This theme is a long-standing priority for EPF and its membership, and is at the heart of the vision of the organisation. Under the tagline ‘Universal Health Coverage for All’, the campaign is an opportunity to raise awareness about the barriers patients face in accessing healthcare, and to build on current political momentum – including the UN Sustainable Development Goals for health – to foster more EU cooperation on access to healthcare.

The evaluation is expected to focus on the campaign’s process and activity delivery, the effectiveness of the communication around the campaign, the emerging outcomes, and the actual contribution of this campaign to advancing EPF priorities in the field of access to healthcare.

- **EPF membership involvement and engagement:** in 2014, EPF adopted its first Membership Strategy, aimed at ensuring that EPF serves the need of its members to the optimum and proposing solutions for the broadening and consolidation of EPF membership. One of the specific goals of the membership strategy was to involve members effectively in “growing” EPF and its member organisations through well-structured consultation and sharing of information, know-how and good practice. After three years of implementation, new tools have been developed and our network is visibly more vibrant.

EPF would now like to evaluate and get feedback on our internal communications and policy consultation process. From this evaluation exercise we hope to get recommendations on how to best align our policy priorities with that of our members and capture their feedback.

- **EPF’s influence and impact on partners and stakeholders:** EPF is active in many policy areas to ensure that patients’ views are incorporated into the EU policy agenda. We develop advocacy strategies to encourage the EU institutions and all relevant stakeholders to think about patients when developing health policies.

Our target audience is quite wide and because of the nature of policy and advocacy work it is often difficult to measure our influence and impact on partners and stakeholders.

We would like the evaluation to help us measure the extent to which we are successful in delivering our messages to other stakeholders and getting our views across to other stakeholders. It would be particularly interesting for us to understand if decision-makers and

stakeholders such as healthcare professionals, trade associations, academics are aware and receptive to our work.

We believe that there are synergies between the three focus areas and we would encourage the evaluators to make use of these synergies when developing the evaluation methodology.

3. EPF - General 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, 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 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 for more information.

4. Description of services

This contract refers to the external evaluation of the EPF 2017 Work Programme.

EPF expects a high-quality assessment of our main achievements against the objectives set out in our 2016 Work Programme, taking into account the established key performance indicators.

The evaluator(s) are expected to specifically look at the effectiveness and impact of our policy advocacy, relationships with key stakeholders, and the effectiveness of our communication outreach.

The service will be considered completed upon successful accomplishment of the following tasks:

- **Task 1:** Developing an Evaluation Plan including evaluation criteria, evaluation questions, and related indicators for each of the objectives outlined above. The evaluation plan shall include evaluation methodology, data collection methods and a clear timeline of evaluation activities. In delivering this task coordination with EPF internal evaluation strategy and plan will be needed.
- **Task 2:** Production of an interim Evaluation Report which shall include specific and workable recommendations for revision/extension/expansion/replication of current processes and activities undertaken in the areas concerned.

- **Task 3:** Production of a final Evaluation Report which shall include specific and workable recommendations for revision/extension/expansion/replication of current processes and activities undertaken in the areas concerned.

The following deliverables shall be submitted to EPF (Deadlines are defined based on contract starting on **5 April 2016**):

Deliverable	Deadline
D1 Evaluation Plan	28 April 2017
D2 Interim Evaluation Report	3 November 2017
D3 Final evaluation report	31 January 2018

5. Participation in the tendering procedure

5.1 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.

5.2 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 (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 one week following the deadline date. EPF is not obliged to provide reasons for its decision to shortlist; EPF has the right to accept or reject any particular tender.

Offers to the tender will be evaluated based on the following criteria:

EPF is looking for proposals from individuals with at least 5-year evaluation experience in at least two of the following evaluation areas:

- Impact assessment of policy advocacy
- Organisational assessment of membership-based civil society organisations with an advocacy mandate
- Programme and project evaluation

Applicants must also demonstrate that they have:

- sound knowledge and understanding of EU-level decision-making processes and institutions
- knowledge of EU-level policies areas EPF is active in <http://www.eu-patient.eu/whatwedo/Policy/A-Z-list-of-topics/>

Applicants must have excellent knowledge of the English language.

5.3 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.

5.4 SCHEDULE

The assignment shall start on **5 April 2017** and shall be completed by **31 January 2018**.

Tender submission and schedule of the work related to it:

Launch Tender	EPF	16 March 2017
Close of the Tender	Tenderer	31 March 2017
Selection of the tenderer	EPF	3 April 2017

6. 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.

A first payment corresponding to 20% of the contract value agreed with the winning tenderer will be released by EPF upon completion of **Task 1 and approval of Deliverable 1 Evaluation Plan by EPF Report** and receipt of the following:

- Final Deliverable D.1
- Invoice

An interim payment corresponding to 40% of the contract value agreed with the winning tenderer will be released by EPF upon completion of **Deliverable D.2 Interim Evaluation Report** and receipt of the following:

- Final Deliverable D.2
- Invoice

A final balance payment will be released by EPF upon completion of **the final Evaluation Report** and receipt of the following:

- Final evaluation report
- Invoice

The maximum contract price is **EUR 9.000** including fees and VAT.

Prices must be fixed amounts in Euro.

The amount of VAT should be shown separately.

7. Quality issues

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

8. 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 Camille Bullot (camille.bullot@eu-patient.eu) at EPF should this status change.

9. 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 date for the signature of the contract will be **5 April 2017**.

10. Contracting authority

European Patients' Forum (EPF)
Rue du Commerce 31
1000 Brussels
www.eu-patient.eu

11. Tender submission

To be considered for this service, tenderers with the required profile shall submit the following documents:

- Tender submission form (Annex 1)
- CV(s) of the evaluator(s)
- 2 references with full contact details
- Relevant examples of evaluation work performed as appropriate.

The offer needs be submitted electronically in English by 31 March to Ms Camille Bulloot, EPF Director of Operations & Engagement at camille.bulloot@eu-patient.eu



This tender arises from the EPF 2017 Work Programme, which has received funding from the European Union, in the framework of the Health Programme.