

EPF Capacity Building Programme

Hungary

Call for Tenders

Training on Fundraising for 9 Hungarian Patient Organisations

1. Background

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. EPF currently represents 64 patients' organisations, including both chronic disease specific patients' organisations operating at the EU level and also national coalitions of patients' organisations.

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 five countries, i.e. Romania, Bulgaria, Hungary, Slovakia, and Cyprus, involving 30 patient organisations globally. The CBP is also targeting pan-European patient organisations and members of EPF through dedicated thematic training modules.

The present call for tenders refers to the delivery in the third phase of the CBP in Hungary. 9 Hungarian patient organisations, including EPF member BEMOSZ (the recently set up Hungarian National Patient Coalition), joined the programme in late 2012. These organisations have so far successfully completed two phases of the programme on strategic and operational planning.

As part of the strategic planning training module, a thorough needs assessment has been conducted with a view to identifying and prioritising further training needs for each organisation. As a result of that needs assessment exercise, building capacity in fundraising was identified as a priority by all nine participating organisations.

- National Association of People with Multiple Sclerosis
- Hungarian League of Patients with Rheumatic Diseases
- Hungarian Osteoporosis Patient Association (HOPA-

- Hungarian Coeliac Society
- Hungarian Federation of People with Rare and Congenital Diseases (HUFERDIS)
- Hungarian Organisation for Patients with Immunodeficiency's (HOPI)
- Delta Hungarian Parkinson Association
- National Stroke League
- BEMOSZ

The EPF Capacity Building Programme is coordinated by EPF Senior Programme Officer Mr Walter Atzori.

2. Purpose and Nature of Services

The purpose and nature of the services is to deliver training and coaching on fundraising to 9 Hungarian patient organisations, and to assist them in developing a fundraising strategy and plan for their organisation.

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

The overall objective of this training module is to strengthen the capacity of 9 Hungarian organisations in fundraising.

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

- Understanding the key concepts and culture of fundraising
- Defining current positioning and unique value proposition of the organisation and effective ways to communicate it
- Mapping and cultivation of current and potential donors with a view to diversifying sources of funding
- Identification of the fundraising strategy/ies that best suit the organisation
- Identifying and pursuing fundraising opportunities (e.g. projects (including EU), foundations, sponsorships, individual donors, fundraising campaigns, donations etc.)
- Defining and developing a fundraising project
- Applying tools and techniques for fundraising
- Ensuring a transparent and independent framework vis-à-vis donors.

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

- Total of at least 9 patient representatives trained who are capable of applying their skills within their own organisations and transfer knowledge acquired to their colleagues
- 9 fundraising strategies developed

- 9 fundraising projects developed and implemented (At least one new funding opportunity per organisation identified and explored in depth)
- Database of current and prospective donors per organisation in place

3. Methodology

This section outlines the proposed methodology for the delivery of this training module in Hungary. The training module on fundraising will consist of a blend of in-person training and remote coaching. 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 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 of fundraising, such as pulling together a consortium to apply for a project or organising a fundraising campaign.

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 fundraising. This task will be delivered by participants as part of the training.
- To help organisations identifying a project to be developed and implemented by the after the first face-to-face training.

II. IN-PERSON TRAINING

Two in-person training sessions will be organised. A training session for all representatives of participating organisations will be delivered to kick-start the fundraising module, provide the participants with an introduction to fundraising, and explain the process of developing a fundraising strategy.

A second in-person training will be organised at the end of the coaching phase. The face-to-face training should take into consideration the different fundraising aims and approaches of the organisation to fundraising. The proposed training could combine different approaches and methods.

III. COACHING

The fundraising expert/s will provide individual coaching to the nine organisations in-between the two in-person training in order to support them with the development of their fundraising strategy and the selected fundraising project.

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 the fundraising strategy and fundraising 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 implementation of the fundraising strategy and development of the fundraising project.

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

- correlate the fundraising approach and project to the organisation's objectives
- advise on strategies and techniques that are most appropriate for the organisation
- provide advice and support in relation to donors' mapping and cultivation
- 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 fundraising approach and plan.

Each organisation will be responsible for developing the fundraising approach and 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.

4. Tasks

The successful tenderer shall implement the following Tasks:

Task	Description
T1	Establishing a baseline assessment of the fundraising capacity of the participating organisations and their representatives who will undergo the training
T2	Designing a training module on fundraising 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 fundraising to be used during the face to face training and the coaching phase.
T5	Delivery of a kick-off face to 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 fundraising strategy and development of a fundraising project.
T8	Delivery of a second face-to-face training at the end of the coaching phase (2 – 3 days).

5. Deliverables

The successful tenderer shall deliver the following deliverables:

Deliverable	Description
D1	Report on baseline assessment of the fundraising capacity and needs of participating organisations and individuals
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 fundraising 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 – D6.9	9 Fundraising Strategies developed
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 – D8.9	9 Fundraising Projects developed by the end of the module

6. Timeframe

This section of the call for tender outlines the proposed timeframe for this contract assuming the contract be signed on 1 April 2015.

Mid-June 2015	Baseline assessment
End-June 2015	Review and finalisation of overall methodology

July-August 2015	First in-person training
July-November 2015	Coaching phase
End-November 2015	9 Fundraising Strategies
End-November 2015	Second in-person training
Mid-December 2015	End of module and delivery of final fundraising plans

7. Volume of contract

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

The duration of the assignment is 6-7 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.

8. Participation in the tendering and selection 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 Hungarian language
- Very good working knowledge of English
- Strong expertise in fundraising
- Expertise in planning and implementing training
- Expertise in coaching organisations

Preference will be given to tenderers that:

- Can also prove experience in fundraising for the non-profit sector
- Can also prove experience fundraising for patient organisations
- Will propose to implement the programme in a team of at least two people.

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

9. 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 in English by **24 April 2015** to Walter Atzori at walter.atzori@eu-patient.eu .