

EPF Capacity Building Programme

ROMANIA

Call for Tenders

Training on Fundraising for 10 Romanian 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 Romania. 10 Romanian patient organisations, including EPF member COPAC (the Coalition of Patients' Organisations with Chronic Diseases from Romania), joined the programme in late 2012. These organisations have so far successfully completed two phases of the programme on strategic planning 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 ten participating organisations.

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 10 Romanian patient organisations, and to assist them in developing a fundraising strategy and plan for their organisation.

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

The overall objective of this training module is to strengthen the capacity of 10 Romanian 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
- 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 a fundraising action plan that defines milestones, targets, and responsibilities
- 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 10 trained patient representatives who are capable of applying their skills within their own organisations and transferring their newly acquired knowledge to their colleagues
- 10 fundraising plans developed
- Database of current and prospective donors per organisation in place
- At least two new funding opportunities per organisation identified and explored in depth

3. Methodology

This section outlines the proposed methodology for the delivery of this training module in Romania. 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 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 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 baseline assessment is two-fold:

- a) To assess the current knowledge-base, skills and experience of participants so that the programme can be built taking into account the baseline
- b) To assess the organisations' past experience in fundraising. This task will be delivered by participants as part of the training.

II. FACE-TO-FACE TRAINING

A training session for all representatives of participating organisations will be delivered to kick-start the process of developing a fundraising strategy. The face-to-face training should take into consideration the different fundraising aims and approaches of the organisation to fundraising. The proposed training should combine different approaches and methods.

III. COACHING

After the face-to-face training session, the fundraising expert/s will provide individual coaching to the participants in order to support them with the development of their organisation's initial fundraising plan and activities.

The coaching will be delivered with both distance learning 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 plan and activities.

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.

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

- correlate the fundraising approach and plan 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.

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	Designing a concept for the coaching component with elements common to all organisations and an organisation-specific part to be formulated following T5
T4	Developing training material on fundraising to be used during the face to face training and the coaching phase.
T5	Delivery of a 2 day face to face training in Bucharest involving one representative per organisation (10 organisations)
T6	Follow-up by means of mentoring/coaching/working together with each organisation to support them throughout the elaboration and finalisation of the fundraising plan.

5. Deliverables

The successful tenderer shall deliver the following deliverables:

Task	Deliverable	Description
T1	D1	Report on baseline assessment of the fundraising capacity and needs of participating organisations and individuals
T2	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
T3	D3	Outline of a concept for the coaching component with elements common to all organisations (part I) and an organisation-specific part (part II) to be formulated following T5
T4	D4	Training material/resources to be used during the face to face and mentoring/coaching training
T5	D5	Short report of the 2-day face to face training including participant list, agenda, main outcomes, follow-up and key issues/challenges faced during the training
T6	D6.1a-	10 draft Fundraising Plans (to be revised by EPF).

	D6.10a	
T6	D6.1b- D6.10b	10 final Fundraising Plans (to be approved by EPF)

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-May 2015	Baseline assessment
End-May 2015	Review and finalisation of overall methodology
Mid-June 2015	Finalisation of F2F programme and related tools
Early-July 2015	Face-to-Face training
July-October 2015	Coaching phase
End-October 2015	10 Draft fundraising plans
End-November 2015	10 Final fundraising plans

7. Volume of contract

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

The duration of the assignment is 9 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 Romanian 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 **15 March 2015** to Walter Atzori at walter.atzori@eu-patient.eu .