

Call for Call for Tender External Evaluation of the EPF 2015 Work Programme

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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.

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 its Annual Work Programme for 2015.

The evaluators are expected to carry out evaluation in respect of the operational objectives set out in the EPF 2015 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**
 - 1A) **Specific objective and thematic area: PATIENT EMPOWERMENT:** To promote the development and implementation of policies, strategies and healthcare services that foster the effective empowerment of patients
 - 1B) **Specific Objective and Thematic area: PATIENT ACCESS:** To promote the development and implementation of policies, strategies and healthcare services that maximise access and reduce health inequality across the EU.
- **OBJECTIVE 2: Reinforcing the Capacity of the patient community actors to effectively contribute to the Health debate**

In carrying out 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 2015 Work Plan

The EPF 2015 Annual Work Plan distinguishes between an Operational Work Programme consisting of all EPF's 2015 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 Plans

On-going 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 assess systematically and objectively 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 in order 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 lead organisation in the EU health policy environment.

2. 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 64 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.

3. Description of services

This contract refers to the external evaluation of the EPF 2015 Work Programme.

EPF expects a high-quality assessment of our main achievements against the objectives set out in our 2015 Work Programme taking into account the key performance indicators set out

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. For an overview of the objectives of the 2015 Work Programme, please refer to Annex II.

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

- **Task 1:** Developing and 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 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.

The following deliverables shall be submitted to EPF (Deadlines are defined based on contract starting on 15th April 2014):

Deliverable	Deadline
D1 Evaluation Plan	15th June 2015
D2 Interim Evaluation Report	30th November 2015
D3 Final evaluation report	31st January 2015

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 (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
- Assessment of effectiveness of communication strategies and campaigns
- 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.

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 on 15th June 2015 and shall be completed by 31st January 2016.

Tender submission and schedule of the work related to it:

Launch Tender	EPF	11 May 2015
Close of the Tender	Tenderer	31 May 2015
Selection of the tenderer	EPF	5 June 2015
Briefing meeting face to face or remote	EPF - Tenderer	The following week

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.

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 7.500 including fees and VAT.

Prices must be fixed amounts in Euro.

The amount of VAT should be shown separately.

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
www.eu-patient.eu

10. Tender submission

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

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

The offer needs be submitted electronically in English by the **31st May 2015** to Mr Walter Atzori walter.atzori@eu-patient.eu



This tender arises from the EPF 2015 Work Programme, which has received funding from the European Union, in the framework of the Health Programme.