

EPF Capacity Building Programme Bulgaria

Training Module on Internal and External Communication

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Contents

1. Purpose of the tender.....	3
2. EPF - General Information.....	3
3. Description of services.....	4
3.1 Methodology , Tasks and Timeframe.....	5
4. Participation in the tendering procedure.....	7
4.1. TENDER PROCESS.....	7
4.2. TENDER EVALUATION.....	8
4.3. EXCLUSION CRITERIA.....	8
4.4. SCHEDULE.....	9
5. Terms of payment.....	9
6. Quality issues.....	10
7. Confidentiality and conflict of interest.....	10
8. Terms and conditions.....	10
9. Contracting authority.....	11
10. Submission.....	11

1. Purpose of the tender

The purpose and nature of the services is to device and deliver a training module to Bulgarian patient organisations in the area of internal and external communication as part of the EPF Capacity Building Programme (CBP).

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. 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 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, Slovakia, 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 second module of the CBP in Bulgaria. 6 Bulgarian patient organisations joined the programme in 2014. These organisations have so far completed the first phase of the programme dedicated to strategic planning and organisational needs assessment. A few more patient organisations (up to ten) are expected to get on board for this new module on communication.

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

3. Description of services

The purpose and nature of the services is to deliver training and coaching on internal and external communication to 10 Bulgarian patient organisations.

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

The overall objective of the training is to strengthen the capacity of up to 10 patient organisations in the area of internal and external communication.

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

- Understanding the role and value of internal & external communication
- Understanding the role of organisational procedures and policies in facilitating internal communication and aligning work with organisation's vision, mission, goals and values
- Awareness and ability to use different communication skills e.g. written, oral, and non-verbal
- Increasing awareness and involvement of targeted and specific groups of individuals, such as member organisations, donors and politicians, into the work of the organisation
- Understanding the role of communication in establishing and maintaining partnerships with stakeholders and donors
- Using communication tools for enhanced visibility e.g. websites, social media, newsletters, etc.
- Identification of communication approaches that best suit the organisation and applying these strategies to the work of the organisation e.g. how to plan and implement a successful campaign
- Defining a planning framework for effective internal & external communication

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

- Total of 7/10 patient representatives trained who are capable of applying their skills within their own organisations and transfer knowledge acquired to their colleagues
- 7/10 communication plans developed
- At least 1 communication project per organisation developed and implemented

3.1 Methodology, Tasks and Timeframe

A detailed methodology will be defined by the communication expert/s responsible for the delivery of the internal and external communication training module. The expert/s will be selected through an open call for tenders.

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 objectives and approaches to work. The specific communication needs of patient organisations should also be addressed. 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 internal and external communication.

I. BASELINE ASSESSMENT

The purpose of the baselines assessment is two-fold:

- To assess the current knowledge-base, skills and experience of participants in the area of communication so that the programme can be built taking into account the baseline
- To help organisations identify a communication project to be developed and implemented by them 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 process of developing a communication plan. A project to be developed and implemented by the organisations will be identified after the first face-to-face training.

A second in-person training will be organised at the end of the coaching phase, to complete the selected projects and address practical issues, specific to each organization.

The face-to-face trainings should take into consideration the different objectives and approaches of the organisation to its work. The proposed trainings could combine different approaches and methods.

III. COACHING

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

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 communication plan and identifying a 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 maximize 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 communication plan.

The consultant's 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
- provide advice and support in relation to potential projects to be developed by the organisation following the first face-to-face training
- 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 communication plan and development of a specific project.

Each organisation will be responsible for developing a communication plan and a project under the leadership of the individual involved in the training session, who will be supported by a small working group of other organisation's representatives.

The successful tenderer shall implement the following Tasks:

Task	Description
T1	Establishing a baseline assessment ('Audit') of the capacity of the participating organisations and their representatives in the area of communication
T2	Designing a training module on communication, which shall include a syllabus outlining the topics to be included in the training (both in person and remote/coaching), teaching methodology approach, and material to be used (English language)
T3	Developing training material on communication to be used during the face to face training and the coaching phase.
T4	Delivery of a first face to face training (1-2 days) in Sofia or other approved location involving max. 2 representatives per organisation (7/10 organisations)
T5	Follow-up by means of mentoring/coaching/working together with each organisation to support them throughout the elaboration of the communication plan and project
T6	Delivery of a second face to face training in Sofia or other previously approved location involving max. 2 representatives per organisation (7/10 organisations) to finalise elaboration of the communication plan and project

The successful tenderer shall deliver the following Deliverables:

Deliverable	Description
D1	Report on baseline assessment of the communication capacity and needs of participating organisations and individuals, as well as agreed training objectives per organisation
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 face to face and mentoring/coaching training.
D4	Short report of the first face to face training including participant list, agenda, main outcomes, follow-up and key issues/challenges faced during the training, as well as a short evaluation
D5	7-10 Draft Communication Plans (to be revised by EPF)
D6	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, as well as a short evaluation
D7	7-10 final Communication Plans
D8	7-10 Communication projects

This section of the call for tender outlines the proposed timeframe for this contract assuming the contract is signed on 20 June 2015.

Mid July 2015	Baseline assessment
Mid July 2015	Review and finalisation of overall methodology
September 2015	First in-person training
September-November 2015	Coaching phase
December 2015	Second in-person training
Mid-January 2015	End of module and approval of final deliverables

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 (80%) and price (20%).

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, accept, or reject any particular tender.

Offers to the tender will be evaluated based on the following 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 Bulgarian language
- Very good working knowledge of English
- Strong expertise in the field of strategic communication, including the use of traditional communication channels as well as social media
- Strong expertise and solid track record of delivering training on communication to civil society organisations
- Demonstrable experience in designing and implementing communication campaigns for civil society organisations.

Preference will be given to tenderers that:

- Can also prove they have experience in working with patient organisations
- Have a sound understanding of the health system in Bulgaria and knowledge/experience of working in the field of healthcare

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 from the date of signature of both contracting parties and shall be completed by 31 January 2016.

Tender submission and schedule of the work:

Launch Tender	EPF	28 May 2015
Close of the Tender	EPF	15 June 2015
Selection of the tenderer	EPF	19 June 2015
Briefing meeting	EPF - Tenderer	20-25 June 2015
Start of the assignment	Tenderer	25 June 2015

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.

The maximum contract price is EUR including fees, administrative overheads and VAT is as follows:

- EUR 9.000 including fees, administrative overheads and VAT if the number of organisations involved is 7
- EUR 10.000 including fees, administrative overheads and VAT if the number of organisations involved is 8
- EUR 11.000 including fees, administrative overheads and VAT if the number of organisations involved is 9
- EUR 12.000 including fees, administrative overheads and VAT if the number of organisations involved is 10.

The duration of the assignment is 6-7 months. The minimum total number of days for the service is:

- 45 if the number of organisations involved is 7
- 50 if the number of organisations involved is 8
- 55 if the number of organisations involved is 9
- 60 if the number of organisations involved is 10.

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. Submission

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 June 2015** to Walter Atzori at walter.atzori@eu-patient.eu.