

EPF Capacity Building Programme Slovakia Call for Tenders

Training on Fundraising for 6 to 10 Slovakian Patient
Organisations

18/05/2015



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1. Purpose of the tender

The purpose and nature of the services is to deliver training and coaching on fundraising to 8 to 10 Slovakian patient organisations (approximately 12-15 individual participants regardless of the actual number of organisations involved), assist them in developing a fundraising strategy for their organisation and work on a specific fundraising project implementing that strategy.

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 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 phase of the CBP in Slovakia. 7 Slovakian patient organisations joined the programme in late 2013 and completed the first phase of the programme on strategic planning and needs assessment. A few more organisations are expected to get on board in the second phase.

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 fundraising to 8 to 10 Slovakian patient organisations, and to assist them in developing a fundraising strategy and plan for their organisation.

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

The overall objective of this training module is to strengthen the capacity of 8 to 10 Slovakian 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 15 patient representatives trained who are capable of applying their skills within their own organisations and transfer knowledge acquired to their colleagues
- 8 to 10 fundraising strategies developed – depending on the actual number of organisations involved
- 8 to 10 fundraising projects developed and implemented – depending on the actual number of organisations involved (at least one new funding opportunity per organisation identified and explored in depth)
- Database of current and prospective donors per organisation in place

3.1 Methodology, Tasks and Timeframe

This section outlines the proposed methodology for the delivery of this training module in Slovakia. 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.

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.

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).

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 – D6.10	8-10 Fundraising Strategies developed depending on the actual number of organisations
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 – D8.10	8-10 Fundraising Projects developed by the end of the module, depending on the actual

	number of organisations
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This section of the call for tender outlines the proposed timeframe for this contract assuming the contract is signed on 15 June 2013.

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 delivery of final fundraising plans

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 5 days 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 Slovakian 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.

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

Tender submission and schedule:

Launch Tender	EPF	Monday 18 May 2015
Close of the Tender	Tenderer	Sunday 7 June 2015
Selection of the tenderer	EPF	Friday 12 June 2015
Briefing meeting	EPF - Tenderer	Mid-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 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:

- 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.

Travel and subsistence costs linked to travel will be covered in addition to the above-mentioned value.

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.

The estimated date for the signature of the contract will be 15 June 2015.

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