

EPF Capacity Building Programme

Hungary

Call for Tenders

Capacity Building Module 4

Training on Strategic Communication and mid-term review of strategic plans 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 65 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 of the fourth phase of the CBP in Hungary. 9 Hungarian patient organisations, including EPF member BEMOSZ (the Hungarian National Patient Coalition), joined the programme in late 2012. These organisations have so far successfully completed three phases of the programme dedicated to strategic and operational planning, and fundraising.

Following the implementation of the fundraising training module, an evaluation workshop was conducted with participating organisations with a view to identifying and prioritising further training needs. Building capacity in communication was identified as a priority by all nine participating organisations.

In addition, the strategic plans developed in Phase I of the CBP cover the period 2014-2018. This offers the organisations an opportunity to conduct a mid-term review of their plans, to review progress made

towards achieving their goals, as well as to reflect on the changing external environment and assess whether a change in the approaches used is needed.

The following organisations are currently participating in the CBP in Hungary:

- 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 (Hungarian National Patient Coalition)

The EPF Capacity Building Programme is coordinated by EPF Director of Programmes and Operations, Mr Walter Atzori.

2. Purpose and Nature of Services

The overall purpose and nature of the services is to deliver training and coaching to 9 Hungarian patient organisations, to strengthen their capacity.

The activities will involve support for the mid-term review of the strategic plans that were developed in 2013 (Part I) and training on strategic communication (Part II). The activities will be delivered in the Hungarian language. Communication with EPF will be in English.

The specific purpose and nature of the services is as follows:

PART I. SUPPORT FOR THE MID-TERM REVIEW OF THE STRATEGIC PLANS

The remit of part 1 is to assist 9 Hungarian patient organisations in reviewing their strategic plans (2014-2018), by providing support and coaching. The aim of the activity is to review progress made towards achieving the strategic goals, as well as to reflect on the changing external environment and assess whether a change in the approaches used is needed.

By the end of the activities, the participating organisations will have reviewed their strategic plans, adapting them to the external environment and increased their understanding of the role of a mid-term review in strengthening the implementation of the strategic plans and the effectiveness of activities. Organisations are expected to develop a set of recommendations to be integrated into the work of the organisations.

PART II. TRAINING MODULE ON STRATEGIC COMMUNICATION

The remit of part 2 is to deliver training and coaching on communication to 9 Hungarian patient organisations, to strengthen their capacity in communication, and to assist them in developing a

communication strategy and communication project plan for their organisation. 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, to liaise with different stakeholders and in conflict management
- Increasing awareness and involvement of targeted and specific groups of individuals, such as member organisations, volunteers, donors and politicians, into the work of the organisation
- Understanding the role of communication in establishing and maintaining partnerships with, individuals, stakeholders and donors
- Using communication tools for enhanced visibility at national and international level 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 the 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 communication strategies developed
- 9 communication projects developed and implemented (at least one new communication opportunity per organisation identified and explored in depth)

Tenderers are invited to submit a bid covering Part I and/or Part II. Please see Section 8 & 9 of this call for tender for more information on participation and section criteria, as well as submission of the tender.

3. Methodology

This section outlines the proposed methodology for the delivery of Part I and Part II activities in Hungary.

The mid-term review of the strategic plans will consist of a face-to-face meeting with each organisation and remote coaching and support. The training module on communication 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 strategic plans and communication aims. The proposed methodology will reflect these differences.

The proposed training will also attempt to strike a balance between theoretical frameworks and practical tools

PART I. MID-TERM REVIEW OF THE STRATEGIC PLANS

A. In person meeting

At least one in-person meeting will be organised with each organisation, to kick-start the process of reviewing the strategic plans. Alternatively the tenderer may consider holding a face to face meeting with all organisations followed by individual meetings with each organisations. Additional face-to-face sessions might be held subject to prior agreement with EPF. The face-to-face meetings should take into consideration the different objectives and approaches of the organisation to its work.

B. Support and coaching

After the face-to-face meeting, the expert/s will provide individual support and coaching at a distance to the participants in order to support them with the review of the strategic plans. This will give organisations the opportunity to address more practical aspects, specific to each organisation. The consultant's role is to give feedback on processes and documents with the aim to:

- support the best use of available tools
- integrate certain key information collected during the face-to-face meeting that might have been overlooked by the organisations

During the coaching period each organisation, through the individual(s) who attended the face-to-face meeting, will communicate weekly with the expert to report upon the stage of reviewing the strategic plan. Each organisation will be responsible for reviewing the strategic plans under the leadership of the individual involved in the face-to-face meeting, who will be supported by a small working group of other organisation's representatives.

PART II. TRAINING MODULE ON COMMUNICATION

A. 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 communication. 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 organisations after the first face-to-face training.

B. In-person training

At least, 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 organisation.

Additional face-to-face training sessions might be held subject to availability of funding and prior agreement with EPF. 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.

C. 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 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 communication strategy and development of the communication project.

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

- correlate the communication 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 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.

4. Tasks

The successful tenderer shall implement the following tasks:

PART I. MID-TERM REVIEW OF THE STRATEGIC PLANS

Task	Description
T1	Information gathering and preparation of face-to-face meetings
T2	Conducting meetings with representatives from participating organisations responsible for monitoring the implementation of the strategic plans
T3	Agreeing on the review of the strategic plans approach to be implemented by the organisations
T4	Follow-up by means of mentoring/coaching/working together with each organisation to support them throughout the review of their strategic plans

PART II. TRAINING MODULE ON COMMUNICATION

Task	Description
T1	Establishing a baseline assessment of the communication capacity of the participating organisations and their representatives who will undergo the training
T2	Designing a training module on communication 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 communication 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 communication strategy and development of a communication project plan.
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:

PART I. TRAINING ON MONITORING AND EVALUATION

Deliverable	Description
D(I)1	Short report on the face-to-face meetings, including main outcomes, follow-up and key issues/challenges faced during the meeting
D(I)2	Set of recommendations for each of the participating organisations
D(I)3	Revised Strategic Plans (if applicable)

D(I)1 and D(I)2 shall be produced in English language.

PART II. TRAINING MODULE ON COMMUNICATION

Deliverable	Description
D(II)1	Report on baseline assessment of the communication capacity and needs of participating organisations and individuals
D(II)2	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
D(II)3	Training material/resources to be used during the two face-to-face events and mentoring/coaching training
D(II)4	List of communication projects selected by the various organisations
D(II)5	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
D(II) 6.1 – D6.9	9 Communication Strategies and 9 outlines of a communication project developed
D(II)7	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
D(II)8.1 – D(II)8.9	9 Communication Projects and 9 outlines of a communication projects developed by the end of the module

D1-D2, D4-D5 and D7 shall be submitted in English language.

6. Timeframe

This section of the call for tender outlines the proposed timeframe for this contract assuming the contract be signed on 5 June 2016.

Mid-late June 2016	Kick-off meeting Module 4
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PART I. REVIEW OF THE STRATEGIC PLANS

June 2016	Meetings with participating organisations
July – September 2016	Remote support for the review of the strategic plans
October 2016	Set of recommendations for each of the participating organisations

PART II. TRAINING MODULE ON COMMUNICATION

End-June 2016	Review and finalisation of overall methodology
August 2016	Baseline assessment
September 2016	First in-person training
September-November 2016	Coaching phase
End-November 2016	9 Communication Strategies & 9 communication project outlines
End-November 2016	Second in-person training
Mid-December 2016	End of module and delivery of final communication plans and project outlines

7. Volume of contract

The maximum contract price for Part I and Part II is EUR 6.000 and 10.000 respectively, including fees, administrative overheads and VAT.

The duration of the assignment is as follows:

- **Part 1** (mid-term review of the strategic plans): 4 months, the minimum total number of day for the service is 25.
- **Part 2** (training module on communication): 7 months, the minimum total number of days for the service is 45.

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:

Part 1 (mid-term review of the strategic plans):

- Native-level knowledge of the Hungarian language
- Very good working knowledge of English
- Very good understanding of the Hungarian healthcare system
- Strong expertise in developing of strategic plans, including monitoring and evaluation of strategy's implementation

Preference will be given to tenderers that:

- Have strong expertise delivering training to civil-society organisations
- Can also prove experience in working with patient organisations
- Will propose to implement the programme in a team of at least two people.

Part 2 (training module on communication):

- Native-level knowledge of the Hungarian language
- Very good working knowledge of English
- Strong expertise in the area of internal and external communication
- Strong expertise delivering training to civil-society organisations
- Expertise in coaching organisations

Preference will be given to tenderers that:

- Have a good understanding of the Hungarian healthcare system
- Can also prove experience in working with 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 **25 May 2016** to Walter Atzori, EPF Director of Programmes and Operations at walter.atzori@eu-patient.eu .