

Call for Tender

Expert researcher – *Schools as learning institutions – European Social Partners in Education promoting effective quality and innovation management models in the education sector in a post Covid-19 era*

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The European Federation of Education Employers (EFEE) and the European Trade Union Committee for Education (ETUCE) are pleased to launch a call for a subcontractor to provide research expertise in the framework of the implementation of the project “*Schools as learning institutions – European Social Partners in Education promoting effective quality and innovation management models in the education sector in a post Covid-19 era*” supported by the European Commission under the European Social Fund+ (ESF+) Social Prerogatives and Specific Competencies Lines (SocPL).

TABLE OF CONTENTS

1. Background: the LearningSchools project	3
1.1. Purpose and scope	3
1.2. Timeline	4
1.2.1. Project Advisory Group meetings	4
1.2.2. Peer Learning Visits	4
1.2.3. Final Conference	4
2. The expert researcher	5
2.1. Tasks to be performed by the successful candidate	5
2.2. Requirements to be a successful candidate	6
3. Payments and standard contract	6
4. Price	7
4.1. Agreed amount	7
4.2. Other arrangements	7
5. Selection criteria	8
5.1. Award criteria	8
6. Content and presentation on the bids	8
6.1. Content of the bids	8
6.2. Presentation of the bids	8

1. Background: the LearningSchools project

1.1. Purpose and scope

EFEE and ETUCE about to kick-start the project *Schools as learning institutions – European Social Partners in Education promoting effective quality and innovation management models in the education sector in a post Covid-19 era*. This project is research-oriented and aims at establishing sustainable and efficient school environments involving all relevant stakeholders in a post COVID-19 era requiring new ways of managing innovation. Within this scope, different models of innovation management across EU countries will be identified and investigated, a working model of innovation management in education institutions will be developed with the aim to be mainstreamed, and guidelines will be prepared for education stakeholders, including ministries of education, local government representatives, school boards, trade union representatives, and education providers. These guidelines will focus on requirements and good practices to establishing an innovation management process that involves various stakeholders and includes means of monitoring progress and outcomes. Furthermore, the project includes the development of policy recommendations for education stakeholders to promote key elements when it comes to implementing and monitoring innovation management, as will be identified through the project itself.

The project will entail the following major research-related elements:

1) A survey on the existing models of management and progress monitoring of the implementation of innovation in the educational context – All EFEE and ETUCE member organisations (education employers and trade union representatives) will be asked to fill in a survey on innovation management and monitoring in their respective countries. The survey will focus on the 27 Member States of the EU and the candidate country Montenegro. The aim will be to search especially for processes that involve close cooperation between education employers and trade union representatives, as the overall goal of the project is to foster such cooperation. The survey should lead to the collection of good practices in innovation management.

2) Four main events: three peer learning visits (PLVs) and one final conference – The PLVs will be opportunities to present models of innovation management and to receive feedback on the results of the survey. Background documents for each PLV will be prepared with the help of the expert researcher, providing background information and points for discussion with the aim to gather feedback and practical insights from education employers and trade union representatives on good practices, obstacles and opportunities for promoting sustainable and innovative methods in European education institutions. The final conference will be an opportunity to discuss and disseminate the project outcomes, including the joint EFEE-ETUCE policy recommendations.

3) Three reflection reports – After each peer learning visit, a reflection report on how the event's programme contributed to the aim of promoting effective quality and innovative models and allowed to gain insight into possible improvements for further follow-up actions. This includes information on the good practices presented by the host countries and the interactive discussion sessions during PLVs to share challenges, experiences, and recommendations for improvement. The reports will also include input from the reflection form to be filled in by the participants after each PLV.

4) Policy recommendations regarding social partners in education promoting effective management and progress monitoring of the implementation of innovation in the educational context – European-level

policy recommendations will be jointly developed by EFEE and ETUCE with the help of the expert researcher, while members will be encouraged to adapt the recommendations to their national contexts. The policy recommendations will also be discussed during the final conference of the project.

1.2. Timeline

In order to deliver on the project’s objectives, four events will be organised; three of them are peer learning visits (PLVs) to take place in Spain, Montenegro, and Hungary in the timeframe of 2023-2024. The project will close with a final conference in Brussels devoted to the sharing of the results, including policy recommendations. Please find the preliminary timeline:

Date	Activity	Location
3-4 October 2023	1 st Peer Learning Visit	Madrid, Spain
October 2023	Advisory Group meeting	online
Last week of November 2023 (exact days tbd)	2 nd Peer Learning Visit	Montenegro
February 2024	Advisory Group meeting	online
April 2024	3 rd Peer Learning Visit	Budapest, Hungary
September 2024	Advisory Group meeting	online
November 2024	Final Conference	Brussels, Belgium

1.2.1. Project Advisory Group meetings

The project foresees the organisation of Project Advisory Group meetings that will contribute to the planning of the main events of the project (peer learning visits and a final conference) and to the development of outputs. The Project Advisory Group meetings will bring together representatives from the European Federation of Education Employers (EFEE) and the European Trade Union Committee for Education (ETUCE) and will be dedicated to fostering dialogue between partners on a regular basis and to serve as a platform for exchanges.

1.2.2. Peer Learning Visits

EFEE and ETUCE member organisations will be given the chance to reinforce their capacity building regarding innovation management by taking part in peer learning visits in three different countries, namely Spain, Montenegro, and Hungary. PLV participants, as well as external stakeholders, will also be invited to present practices as examples for the implementation or the reassessment of processes in different countries. In addition, PLVs will include local school visits, allowing participants to gain in-depth practical on-site knowledge of the topic at stake in the respective school contexts and therewith bound challenges and opportunities by engaging in a dialogue with school representatives.

1.2.3. Final Conference

The final conference will take place in Brussels, Belgium. The conference is devoted to sharing the outcomes of the project, including the research report with guidelines and the policy recommendations.

Relevant results from the different peer learning visits and examples of good practices uncovered in the course of the project will also be presented. Participants will be invited to discuss the outcomes of the project and to provide input to the final draft of the policy recommendations.

2. The expert researcher

In order to ensure that the project has a strong evidence base, we deem it crucial to invite an external expert researcher to assist with the mapping of innovation management processes and methods throughout the European Union. The external expert is expected to write a substantial research report and outcome document analysing the theoretical framework from the literature study with the practical knowledge gained through the peer learning visits with expert insight. The research report aims to develop a concrete and well-covered outline for various stakeholders, will feed into the final project report and add substantial information and support to the joint EFEE-ETUCE Policy Recommendations on promoting efficient management of innovation in education institutions as well as ensuing monitoring practices.

The expert researcher is expected to have proven research experience and extensive knowledge about the European education landscape. Furthermore, the expert will showcase a significant understanding of the social dialogue structures in education to be able to identify the most pressing challenges and opportunities accordingly.

The total budget for subcontracting the expert researcher tasks is €30.000 (about 60 working days at the rate of €500/day), based on previous experiences with external experts.

2.1. Tasks to be performed by the successful candidate

The expert is expected to perform the following tasks in the time framework from July 2023 to December 2024:

1. **Participate** in a pre-project meeting with EFEE and ETUCE (online), three online meetings with the Project Advisory Group, three peer learning visits, as well as a final conference.
2. **Conduct** desk research to map innovation management processes and methods in the education sector throughout the EU in the post-Covid-19 era and develop a substantial research report and outcome document analysing and comparing the theoretical framework from the literature study with the practical knowledge gained through the peer learning visits.
3. **Investigate** innovation management processes and methods in the education sector in the post-Covid-19 era and compare these with the knowledge gained through hands-on experience in the host countries of the PLVs, while identifying the most effective quality and innovation management models.
4. **Develop**, with the input from the project advisory group, an online survey to be carried out amongst EFEE and ETUCE member organisations to get insight into their current knowledge, practices and challenges when it comes to innovation management processes and methods in the education sector in the post-Covid-19 era.
5. **Develop**, with the input from the project advisory group, interview questions to be asked during PLVs with the aim to identify and subsequently be able to promote effective innovation management processes and methods in the education sector in the post-Covid-19 era.

6. **Scientifically accompany** the peer learning visits in Spain, Montenegro, and Hungary, and subsequently, **draft** a reflection report based on the evaluation and analysis of the findings gained after each PLV when it comes to the topic at stake. The reflection reports will be presented to the Project Advisory Group members for input and approval.
7. **Draft** a final project report (including Executive Summary), outlining the outcomes of all project activities (including survey, desk research, peer learning visits) and drawing conclusions on effective quality and innovation management models in the education sector in a post-Covid-19 era.

2.2. Requirements to be a successful candidate

EFEE and ETUCE require the expert researcher (hereafter, Contractor) to provide an objective and scientific perspective along with expertise on the issue at stake while carrying out the tasks outlined above. Therefore, the Contractor is expected to display the following competences:

1. Proven (research) experience and extensive knowledge of innovation management models in the education sector.
2. Significant understanding of social dialogue structures in education is preferable in order to identify the most pressing challenges and opportunities accordingly.
3. Experience in conducting surveys and interviews in the education sector.
4. Understanding of the role of social partners in the education sector as well as an overall understanding of the education sector (both on the European and national level).
5. Ability to communicate fluently verbally and in writing in English (at least C1 level). Additional European languages will be considered an asset.

The Contractor contributes to the successful development of the project as a whole by actively participating in project activities and meetings. The Project Advisory Group is the body entitled to guide the project/research implementation with regards to its organisation and evaluation.

3. Payments and standard contract

The contract to be signed between EFEE and the Contractor will be subject to the Grant Agreement signed between EFEE and the European Commission for this project initiative. Payment of the fees defined in the contract will be made in two instalments dependent on the Contractor carrying out the relevant stages of work as listed above.

1. A first instalment amounting to 50% (15.000€), issued after signature of the contract.
2. A second instalment for the remaining payment (15.000€) issued after completion, delivery and approval by EFEE and ETUCE of the final outcome.

Payments will be done by bank transfers to a bank account for which the Contractor will communicate the full details.

The contractual agreement will be based upon and regulated by the European Commission's rules, provisions and requirements as set out in the project agreement with the European Commission, DG

EMPL and applicable Belgian law. The Contractor will be obliged to fulfil the described tasks and duties of work to receive the final payment according to the contract.

EFEE has the right, based on Belgian Law, to terminate the contract if the Contractor cannot perform the agreed tasks and duties accordingly. Any conflicts of interests or disputes concerning the validity of this arrangement, the construction of its terms, and the interpretation of the rights and duties of the parties in the contract shall be governed by Belgian Law. The contract may not be transferred without the parties' written agreement.

4. Price

4.1. Agreed amount

Subject to the final Grant Agreement established between the European Commission and EFEE for the purpose of this project, the total amount available for the tasks described here above during the project lifetime will be of maximum €30.000 (about 60 working days at the rate of €500/day) of including all taxes (such as, e.g. VAT).

4.2. Other arrangements

Expenses: The Contractor will be reimbursed, on receipt of full documentation according to the European Commission's requirements with regards to travel – economy flight and train tickets –, accommodation expenses (unless accommodation is directly provided), and transfer to and from the airport (by public transportation; taxis not reimbursed) for their participation in the peer learning visits and the final conference.

Processing personal data: The contracting party accepts that the Contractor be free to use the data collected and the reports written in this project as part of their own academic reports and articles, as long as they include the relevant references to the project.

However, in order to fulfil or respect the modernised Convention 108 (the regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000) and EU General Data Protection Regulation (GDPR) on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data:

- The Contractor must process personal data under the agreement in compliance with applicable EU and national law on data protection (including authorisations or notification requirements);
- The Contractor may grant its personnel access only to data that is strictly necessary for implementing, managing, and monitoring the agreement;
- The Contractor must adopt appropriate technical and organisational security measures having regard to the risks inherent in the processing and to the nature of the personal data.

5. Selection criteria

Aside from the above stated requirements, the selection process will be based 1) on acceptance of the tender offering the best price-quality ratio and 2) on the availability of the Contractor during the duration of the project for the requested tasks. The Contractor is selected according to the standards of selection that have been developed by EFEE. The main selection criteria are the expertise and capacity to deliver the work tendered for, the price-quality relation, the methodological quality and the tenderer's work experience. It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the award criteria.

5.1. Award criteria

The contract will be awarded to the tenderer whose offer represents the best value for money, taking into account the following criteria:

1. Evidence track record of proven research experience and extensive knowledge of innovation management models in the education sector, and preferably of social dialogue structures in education too.
2. Proficient capacity in the English language (additional European languages will be considered an asset)
3. Understanding of the nature of the assignment
4. Capacity to work in a team project
5. Ability to meet deadlines
6. Ability to meet budget allowances
7. Availability to attend visits and meetings

6. Content and presentation on the bids

6.1. Content of the bids

The bids should contain a detailed explanation of the qualifications and the expertise of the potential contractor, e.g. information on references from the contractor on similar projects already handled, to demonstrate their experience and capability to succeed in performing the tasks as set out in section 2 of this tender.

The bids should include a detailed description of the methodology and tools applied to implement a project plan with detailed time and cost planning. The potential contractor is also requested to send a budget listing the costs by task including a fair estimation of the number of working days and the number of people participating in the tasks.

6.2. Presentation of the bids

Replies have to be presented by **18 June 2023 at the latest** to daniel.wisniewski@educationemployers.eu and marieceline.falisse@educationemployers.eu.

Subject: Expert Researcher for LearningSchools