Partnership Opportunity - External - Agency Login

🎯 Overview

A "**Call for Proposal**" (CFP) or "**Call for Expression of Interest**" (CFEI) is a formal invitation or announcement issued by a UN agency to invite civil society organizations to submit proposals or expressions of interest for a specific project, program, funding opportunity, or partnership. The purpose of a CFP/CFEI is to attract potential partners who are interested in and capable of contributing to the goals and objectives outlined in the call.

When a CFP/CFEI is released, it provides detailed information about the project or programme, including its scope, objectives, eligibility criteria, application requirements, deadlines, evaluation criteria, and any specific guidelines or instructions for submission. Interested civil society organizations are then expected to prepare and submit their concept notes based on the guidelines provided.

The concept notes received in response to a CFP/CFEI are evaluated and assessed based on predetermined criteria to determine the most suitable entities to be selected for further consideration, such as funding, collaboration, or participation in the project or program.

Overall, a CFP/CFEI serves as a transparent and structured process to solicit concept notes from potential partners, enabling the UN agency to identify and engage with qualified partners.

Objective:

The objective of this user guide is to provide step-by-step instructions on how to create and publish a Call for Expressions of Interest (CFEI) on the UN Partner Portal.

📊 Why is this functionality required?

A Call for Proposals or Call for Expressions of Interest (CFEI) is used for several reasons:

- By issuing a formal call, the organization ensures transparency and fairness in the selection process. It provides an equal opportunity for all interested civil society organizations.
- A CFEI helps reach a wide range of potential partners. It allows the UN agency to tap into diverse expertise, innovative solutions, and resources that may not be readily accessible through other means.
- By inviting proposals or expressions of interest through a structured process, the UN agency can efficiently evaluate and compare the submissions. This helps in identifying the most suitable partners or solutions for the given project or program.
- A CFEI process provides a clear framework for accountability and governance. It allows the organization to establish evaluation criteria, review panels, and selection processes, ensuring a rigorous and accountable decision-making process.
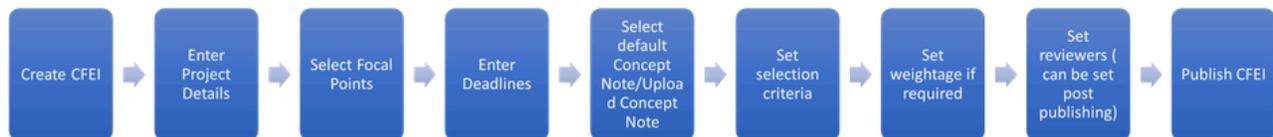
🤔 Assumptions / Prerequisites

To proceed with creating and publishing a CFEI on the UN Partner Portal, you need to be an authorized user

User Role:

- Be an Advanced Editor (Create and Publish CFEI)
- Be a Basic Editor (Create CFEI)

🎨 User interaction and design

Publish CFEI

Positive Flow

To create a new Call for Expressions of Interest (CFEI) on the UN Partner Portal, follow these steps:

- Access Partnership Opportunities:
    - On the left navigation panel, locate and click on "Partnership Opportunities. "Start a New CFEI:
- Within the Partnership Opportunities section, click on the "New CFEI" button.

NEW CFEI

- Enter Project Details:
    - In the CFEI creation form, provide the necessary project details.
    - Start by entering a descriptive project title in the "Project Title" field.
    - Scroll down to continue with the CFEI creation process.


Project Title

- Search for the location where the project or programme will be implemented:
    - Enter a location keyword in the search bar.
    - The search recommendations will display country names
    - Click on the appropriate country
- Pin the location(s) on the map where the project or programme will be implemented:
    - Use the map to pin the precise location(s).
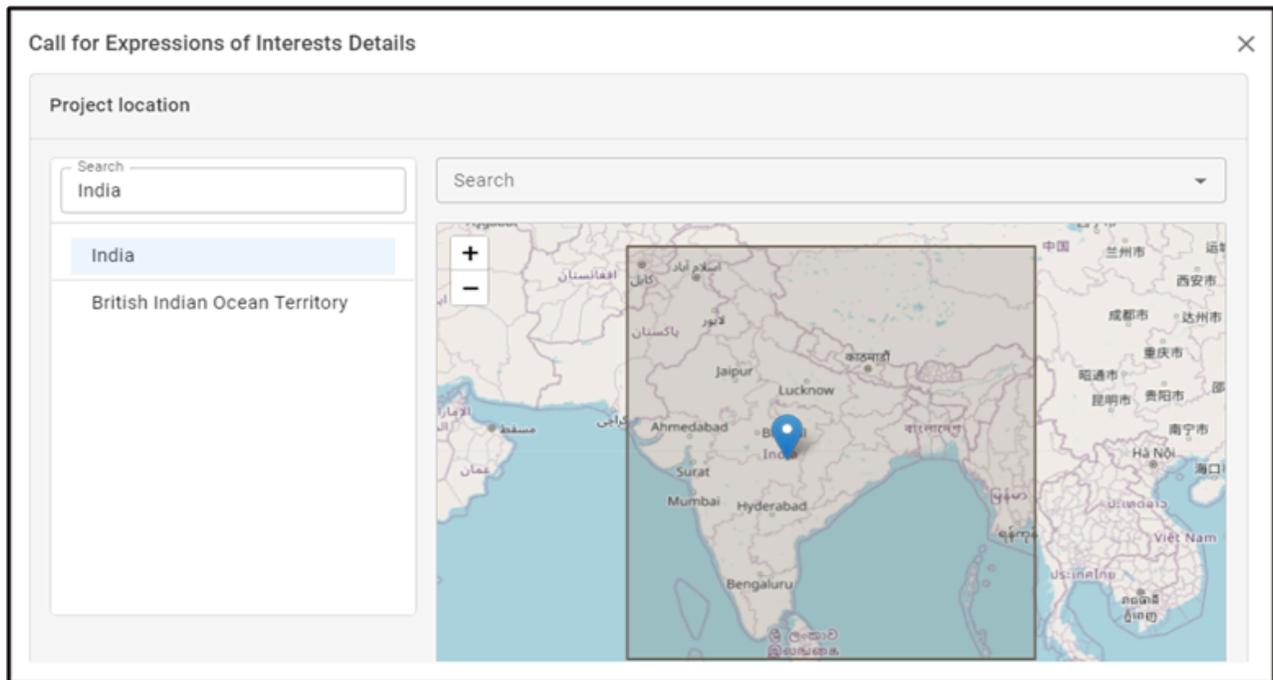
Location

Please note you need to use your cursor(mouse) to pin a location in the map after selecting the country

- Select Project Focal Points:
    - Scroll down further and find the "Project Focal Points" field.
    - Click on the dropdown icon to reveal a list of focal points.
    - Select the appropriate focal point from the list
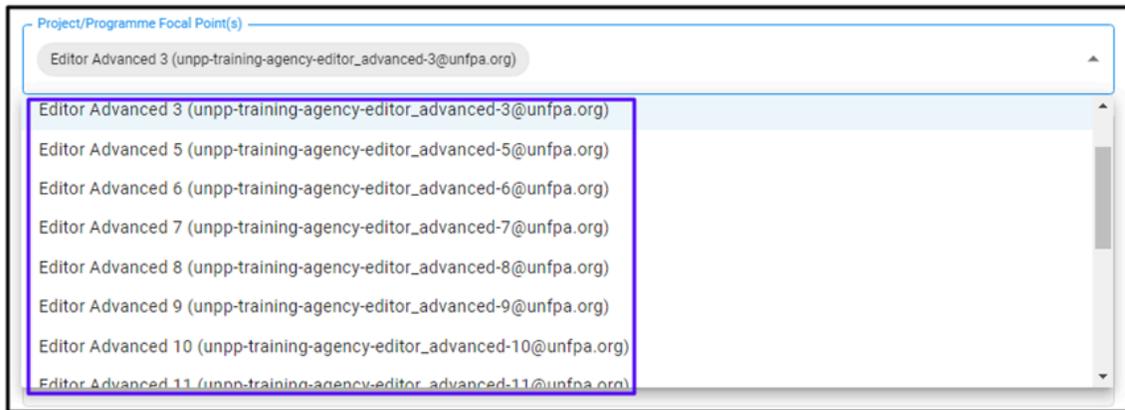
Focal Points

Please note that only Advanced Editors/MFT users can be selected as Focal points so only their names and e-mail addresses will be shown in the selection box.

- Specify Sectors and Areas of Specialization:
    - Click on the dropdown menu to select the relevant "Sector(s) and area(s) of specialization."

Sector(s) and area(s) of specialization

- Provide Project Background, Expected Results, Budget, and Other Information:
  - Enter the project background and expected results.
  - Include any additional optional details, if necessary.

Project Background Details

Set Deadlines

To set the deadlines for a Call for Expressions of Interest (CFEI) on the UN Partner Portal, follow these steps:

- **Select Deadlines:**
  - In the CFEI creation form, locate the "Deadlines" section.
  - Click on the date icons within the field to select the desired dates.
  - Alternatively, you can manually enter the dates in the provided date fields.
- Please note the following important information regarding the deadlines:
  - **Clarification Deadline:**
    - The Clarification Deadline is the last day on which partners are allowed to ask for clarification regarding the CFEI.
  - **Application Deadline:**
    - The Application Deadline is the last day on which partners can submit their applications for the CFEI.
    - Partners are not required to wait for the Clarification Deadline to pass before applying.
  - **Deadline Dependencies:**
    - The Clarification Deadline must occur before the Application Deadline.
    - The Application Deadline must happen before the Notification of Results.

- The Notification of Results must occur before the Estimated Start Date.
- The Estimated Start Date must happen before the Estimated End Date

By following these steps and considering the deadline dependencies, you can accurately set the necessary deadlines for your Call for Expressions of Interest (CFEI) on the UN Partner Portal.

Deadlines

Concept Note

- Scroll down to find the "Concept Note Template."
- Select "Attach the standard template (recommended)." This will display to interested applicants the UN agency's standard concept note template, as designed by the UN agency's headquarters.

Default Concept Note

- Alternatively, select "Attach a non-standard template for this CFEI" to upload a custom template using the "Select File" option.

Custom Concept Note

- Any document file type can be uploaded as the concept note.

Attachments:

- Click on "SELECT A FILE" to upload a document.
- Optionally, enter a description for the attachment.

- To upload another document, click on "+ ADD NEW."

Selection Criteria

Selection Criteria (Weighting Relevant to the Project):

- Select "Yes" for weighting the selection criteria relevant to the project.
- Choose an option from the "Criteria" dropdown field.
- Provide a description in the "Description" field for the selected criteria.
- Set the weight for the criteria using the "Weight" option.

Note: The sum of all weights must be equal to 100 (mandatory).

- To add a new criteria, click on the "ADD NEW" button.
- After completing the criteria, choose to either save or cancel the CFEI.

- Selection Criteria (No Weighting Relevant to the Project):
- Select "No" for not weighting the selection criteria
- Choose an option from the "Criteria" dropdown field.

- Provide a description in the "Description" field for the selected criteria.
- To add a new criteria, click on the "ADD NEW" button.
- After completing the criteria, choose to either save or cancel the CFEI.'

Invitation of Partners and CFEI Creation:

- If desired, enter the names of specific partners registered in the portal to invite them to apply for the CFEI.
- The invited partners will receive an email notification.
- Skipping this step is also an option.

CFEI Overview and Publishing

- Review the overview of the created CFEI.
- Click on the "PUBLISH" button to make the CFEI publicly viewable to all.
- Please note: You will be able to publish the CFEI while logged in as an Advanced Editor, which is why you see the "publish" button. If you were logged in as a Basic Editor, you wouldn't have the option to "publish." You would only be able to send to the Advanced Editor.

- A confirmation window will appear; click on "PUBLISH" to proceed.

CFEI Finalization

- The CFEI is now published, and the "FINALIZE" button is enabled.

Download CFEI as a PDF

To download the Call for Expressions of Interest (CFEI) as a PDF document from the UN Partner Portal, follow these steps:

- Locate the Download Options:
  - On the top right corner of the page, look for three dots (...) representing additional options.
- Select "Download as PDF":
  - Click on the three dots (...) to open the menu.
  - From the menu options, choose "Download as PDF."
- Download the PDF Document:
  - The CFEI will be generated as a PDF file.
  - Depending on your browser settings, it may automatically start downloading or prompt you to select a location to save the file.
  - Choose the appropriate location on your device to save the downloaded PDF document.

By following these steps, you will be able to **download the Call for Expressions of Interest (CFEI) from the UN Partner Portal as a PDF document for offline viewing or printing.**

EDIT CFEI

To edit a Call for Expressions of Interest (CFEI) on the UN Partner Portal, follow these steps:

Locate the Edit Option:

- Look for three dots (...) on the top right corner of the page. These dots represent additional options.

Select "Edit":

- Click on the three dots (...) to open the menu.
  - From the menu options, choose the "Edit" option.

Edit the CFEI:

- The CFEI will open in the editing mode, allowing you to modify the existing information.
- Update the necessary fields if required. Please note, you will not be able to edit all the fields if the CFEI is published.

Save the Changes:

- After making the desired modifications, ensure to save the changes.
  - Look for a "Save" button within the editing interface.
  - Click on the appropriate button to save the updated CFEI.

By following these steps, you will be able to edit a Call for Expressions of Interest (CFEI) on the UN Partner Portal. Make sure to review and verify the changes before saving to ensure accurate and up-to-date information is reflected in the CFEI.

Managing Reviewers for a CFEI

To manage reviewers for a Call for Expressions of Interest (CFEI) on the UN Partner Portal, follow these steps:

- **Locate the Manage Reviewers Option:**
  - Look for three dots (...) on the top right corner of the page. These dots represent additional options.
- **Select "Manage Reviewers":**
  - Click on the three dots (...) to open the menu.
  - From the menu options, choose "Manage Reviewers." Only Advanced Editors & Basic Editors will be displayed under this list.

- **Select Reviewers:**
  - Within the "Manage Reviewers" section, you will find options to Select reviewers.
  - Follow the provided instructions to add the desired reviewers for the CFEI.
- **Send the Reviewer Invitations:**
  - After adding the reviewers, click on the "SEND" button or similar action to send invitations to the selected individuals.
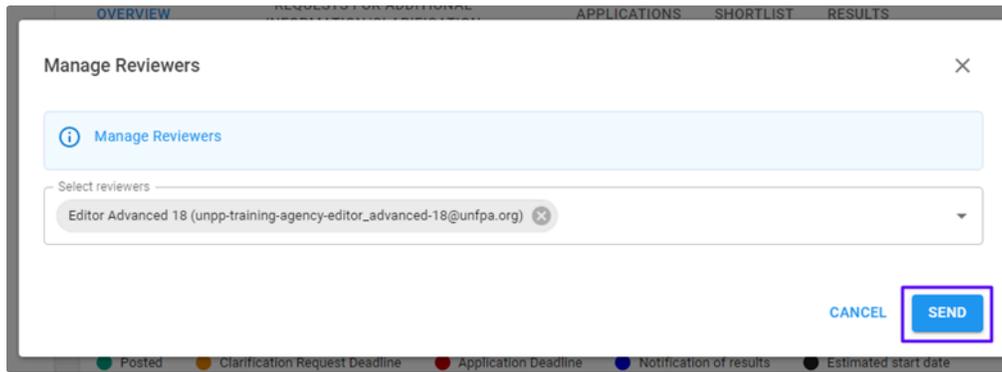
Sending Invitations to Partners for a CFEI

- **Locate the Invite Partner Option:**
  - Look for an option such as "Invite partner" that allows you to send invitations.
- **Select the "Invite Partner" Option:**
  - Click on the "Invite partner" option to proceed with sending the CFEI invitation.
  - Basically, partners can be invited either immediately prior to CFEI publishing, or anytime thereafter, so long as the CFEI is active.
- **Send the CFEI Invitation:**
  - Upon selecting the "Invite partner" option, you will be prompted to enter the necessary information.
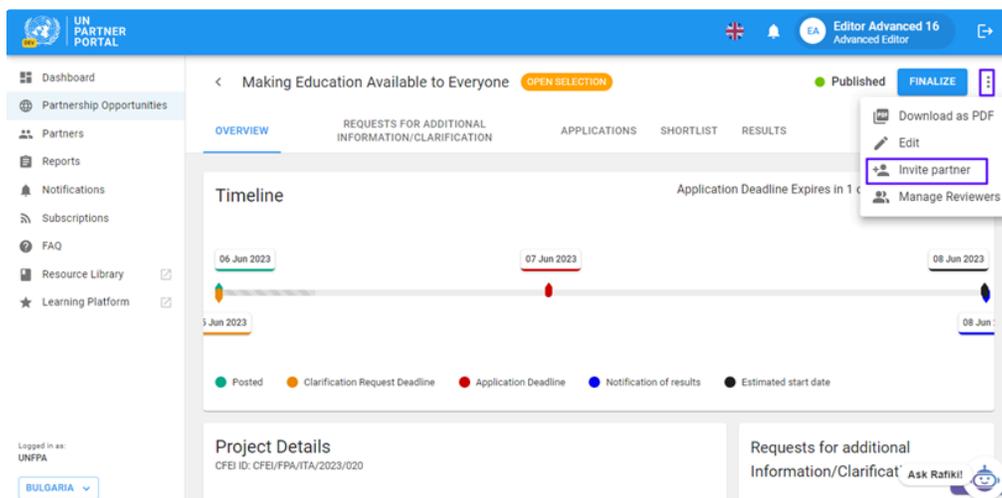
Requests for Additional Information/Clarification

What are 'Requests for additional Information/Clarification?

Requests for Additional Information/Clarification are inquiries raised by all Partners regarding the CFEI (Call for Expression of Interest) published by the UN agency. These inquiries aim to seek further details or clarification about specific aspects of the CFEI.

Partners, which may include organizations or individuals interested in participating in the initiative, have the opportunity to submit these requests to the UN agency. By doing so, they can obtain additional information that will assist them in better understanding the requirements, objectives, or any other relevant details related to the CFEI.

The purpose of these requests is to address any uncertainties or ambiguities that Partners may have, ensuring a clearer understanding of the CFEI and enabling them to prepare more informed and precise proposals or expressions of interest.

Once the UN agency receives these requests, it reviews and responds to them, providing the necessary clarifications to all Partners involved.

To view requests for additional information or clarification regarding a Call for Expressions of Interest (CFEI) on the UN Partner Portal, follow these steps:

- **Locate the Requests Tab:**
  - Look for a tab or section titled "Requests for Additional Information/Clarification."
  - Click on this tab to access the information related to the requests.
- **View the Request Information:**
  - Upon accessing the "Requests for Additional Information/Clarification" tab, you will find the relevant information.
  - Review the requests made by partners for additional information or clarification regarding the CFEI.

By following these steps, you can easily view the requests for additional information or clarification submitted by partners for a specific Call for Expressions of Interest (CFEI) on the UN Partner Portal. This feature helps you stay informed about partner inquiries and enables you to respond accordingly.

To respond to clarification request for a Call for Expressions of Interest (CFEI) to partners, follow these steps:

- **Wait for the Clarification Request Deadline:**
  - Ensure that the Clarification Request Deadline, specified in the CFEI, has passed.
- **Click on "Upload File":**
  - Locate the option to upload a file, typically provided for submitting responses to clarification requests.
  - Click on the "Upload File" button to proceed.
- **Provide a Title and Enter the Response Information:**
  - Before uploading the file, ensure to provide an appropriate title for the response document.
  - Enter the necessary information in the file to respond to all partners' clarification requests in a consolidated manner.
  - Include comprehensive and accurate information that addresses the partners' queries effectively.
- **Upload and Save the File:**
  - Select the file containing the response to the clarification requests from your computer
  - Upload the file to the UN Partner Portal
  - After successfully uploading the file, save the changes to ensure the response is recorded.

Reviewing Applications for a CFEI

- **Locate the Applications Tab:**
  - Look for a tab or section titled "APPLICATIONS."
  - Click on this tab to access the applications received from partners.
- **View Applications:**
  - Upon accessing the "APPLICATIONS" tab, you will find a list of applications submitted by partners.
  - Review the information provided in each application to assess its suitability.
- **Select a Partner for Review**
  - Choose a partner from the list of applications that you would like to review
  - Click on the partner's name or designated section to access their application details.
- **Shortlist an Application:**
  - After reviewing the partner's application, use the provided options or icons to indicate your decision.
  - Locate the thumbs-up icon to shortlist the application.
  - Locate the thumbs-down icon to not shortlist the application.
- **Review by UN Agency Reviewer:**
  - The application review is typically conducted by the designated UN Agency reviewer, who is either the creator or the focal point of the CFEI.
  - The UN Agency reviewer, will assess the application based on the provided criteria.

By following these steps, you will be able to review applications submitted by partners for a specific Call for Expressions of Interest (CFEI) on the UN Partner Portal.

Adding a Review for a CFEI:

- **Locate the "ADD REVIEW" Button:**
  - Look for a button or option labeled "ADD REVIEW" and click on it to proceed.

- **Fill in Review Details:**
  - Once you access the review section, you will be presented with fields to enter the necessary details.
  - Assess the application against each criterion and assign scores accordingly.
  - Consider the provided evaluation criteria and weigh the application's strengths and weaknesses accordingly.
  - Enter the scores in the designated fields, ensuring accuracy and fairness in your evaluation.

- **Save the Review:**
  - After filling in all the necessary details, click on the "SAVE" button or a similar action to save your review.
  - This ensures that your review is recorded and considered during the evaluation process.

Add Feedback to Partner:

- Alongside scoring, provide feedback to the partner regarding their application. This feedback will be visible to the partner once the CFEI is finalized.

Adding a Summary to the Review Results

- **Select the "Result" Tab:**
  - Look for a tab or section labeled "Result" and click on it to access the review outcomes.
- **Click on "Add Summary" in the "Review Summary" Card:**
  - Within the "Result" tab, locate the "Review Summary" card.
  - Click on the option labeled "Add Summary" to proceed.
- **Provide the Summary:**
  - A text field/editor will appear, allowing you to enter the summary for the review results.
  - Include a concise and informative summary highlighting the key findings or conclusions of the review process.
- **Save the Summary:**
  - Once you have provided the necessary summary, click on the "Save" button to save your input.
  - This ensures that the review summary is recorded and can be accessed by relevant stakeholders.

Completing Assessment for a Partner in the Shortlist

- **Go to the "Shortlist" Tab:**
  - Look for a tab or section labeled "Shortlist" and click on it to access the list of shortlisted partners.
- **Select the Partner:**
  - From the list of shortlisted partners, locate and click on the partner you wish to assess.
  - This will open the partner's assessment details and evaluation page.
- **Click on "COMPLETE ASSESSMENT" Button:**
  - Within the partner's assessment page, locate the "COMPLETE ASSESSMENT" button and click on it to proceed.

- **Confirm Assessment Completion:**
  - A confirmation prompt or dialog box may appear to ensure your intention to complete the assessment.
  - Review the information provided and click on the "COMPLETE" button to finalize the assessment.

- **Submit the Assessment:**
  - After clicking on "COMPLETE," the assessment for the selected partner will be submitted.

Please be aware that the Complete Assessment button will only become enabled once all assigned reviewers for the CFEI (Call for Expression of Interest) have finished their assessments.

To finalize and update the status of a Call for Expressions of Interest (CFEI) on the UN Partner Portal, follow these steps:

- **Complete the Assessment:**
  - Ensure that you have completed the assessment for the partners in the shortlist.
  - Once you have provided your evaluation and feedback, the "RECOMMEND" button will be enabled.
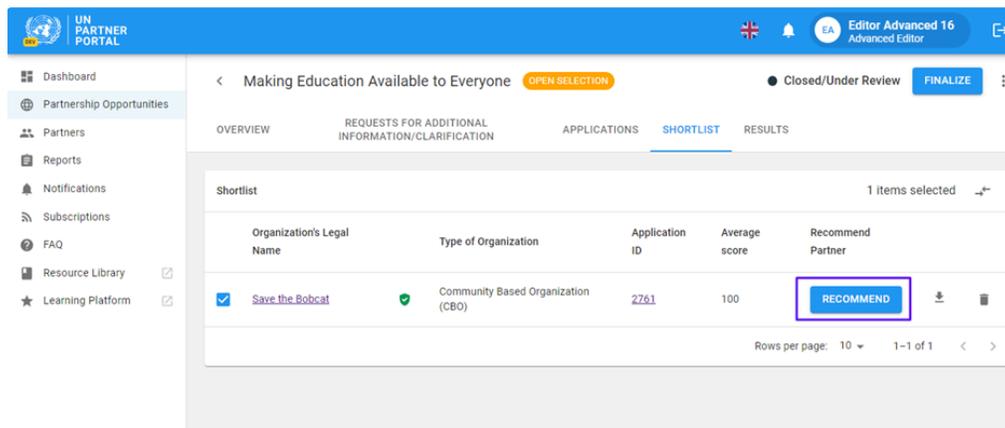
- **Click on the "RECOMMEND" Button:**
  - After completing the assessment, click on the "RECOMMEND" button to proceed.
  - The button will change from blue to green, indicating that you have recommended the partner(s) for further consideration.
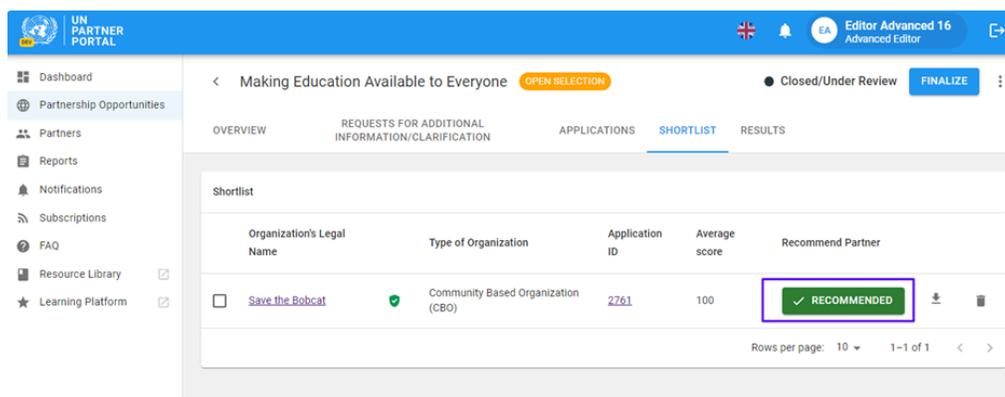
- **Navigate to the "Result" Tab:**
  - Go to the "Result" tab or section to access the finalization options and update the CFEI status.
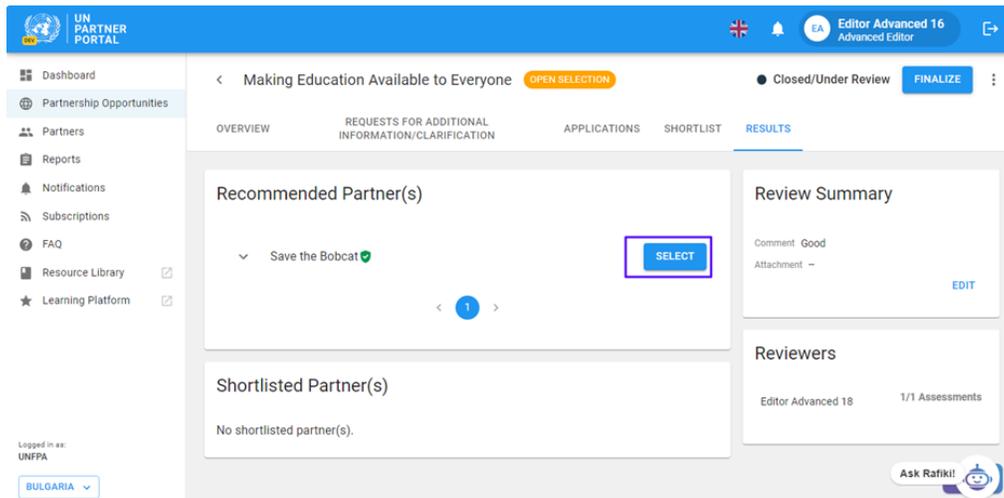
- **Click on the "SELECT" Button:**
  - Within the "Result" tab, locate and click on the "SELECT" button to update the CFEI status.
- **Add Justification and Submit:**
  - A justification window will pop up, prompting you to provide a justification for the status update.
  - Enter the necessary information in the justification field and click on the "SUBMIT" button to proceed
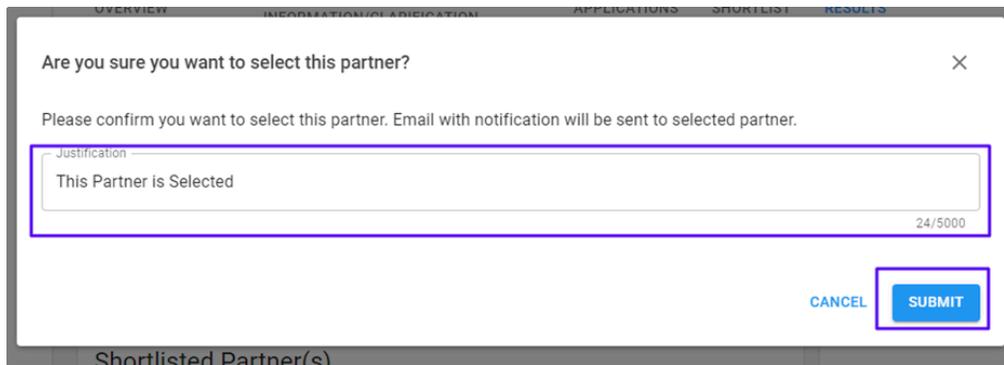
- **Partner's Acceptance and Finalization:**
  - If the partner accepts the CFEI, click on the "FINALIZE" button to proceed.
  - Depending on the outcome, select the appropriate finalization status:
    - **"Finalized-Partner accepted" if the partner has accepted the CFEI.**

- **"Finalized-cancelled" if the CFEI has been canceled.**

- **"Finalized-no successful applicant" if no successful applicant was identified.**

- Click on the "Finalize" button to update the CFEI status accordingly.

- **Finalized Status Confirmation:**
  - Once the CFEI is finalized, the status "Finalized – partners accepted" will appear in the top right corner of the page.
  - This confirms that the CFEI process has been completed and the final status has been set.
  - All non-selected partners will receive a system-generated e-mail indicating that they were not selected. At this time, any feedback provided to partners during the review process will become visible to the partner.

Troubleshooting Steps

- Unable to publish CFEI?
    - Check if you are a Basic Editor / Advanced Editor
    - If you are Basic Editor, you can only CREATE CFEI and CANNOT publish CFEI
    - Only the advanced editor will be able to publish the CFEI
- Complete Assessment Button not enabled?
    - Please check if all the reviewers have completed assessment
    - Only when all the reviewers have completed their assessment, the complete Assessment button will be enabled

FAQ

❓ Open Questions

Question	Answer	Date Answered
- Update the necessary fields, such as project details, title, deadlines, attachments, and selection criteria (till when can i edit these fields)		

⚠ Out of Scope

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