

Assess a Call for Expression of Interest

Overview: Learn how to assess a call for expression of interest (CFEI) and select a civil society organization for partnership.

These steps should be performed by a PAM user and one or more MFT users; one MFT user will play the role of **focal point** and the same or other MFT users will perform the role of **reviewer(s)**. The color codes suggest which step can be performed by which role. Based on the above-written, **purple** and **green** roles optionally can be performed by the same MFT user.



Steps	Description	Action	Notes	
1	Navigation	After logging in, click on 'Partnership Opportunities (1)' in the left navigation bar. Use the filters to find the CFEI to assess		
2	Shortlist Applications	Click on the 'applications tab (2)' to view and shortlist the applications on the CFEI. Use the filters to assist in shortlisting potential organizations. To shortlist the user click on the organization you want to shortlist and then click on the 'thumbs up (4)' sign in the blue band to select multiple applications.	Shortlisting can only be done after the CFEI application deadline has passed and the CFEI status is 'closed/under review (3)'. The filters search against fields in the organization's profile. Therefore, if you only want to list NGOs that work in country a, location b, then filters can be used to find only those organizations that meet the criteria. You can click on the 'thumbs down' sign to reject an application.	
3	Reviewers	To add reviewers to your CFEI, click on the 'vertical ellipses (1)' next to the finalize button. In the dropdown, select 'Manage Reviewers (2)'. Enter the names of the reviewers in the 'modal (3)' and click 'Send (4)'.	The CFEI creator or the focal point can add the focal point as a reviewer if the focal point is part of the assessment team but reviewer can be other MFT user as well. Reviewers can be MFT users only. The user's must be assigned these roles in the system for their names to be displayed. Reviewers will be sent an email and in-app notification. It is advised to add reviewers after you have shortlisted the applications.	
4a	Assess CFEI as reviewer	In the <i>dashboard</i> (1), scroll down to 'List of concept notes requiring your scoring (2)'. Click on the <i>CFEI ID hyperlink</i> (3) to be directed to the CFEI	Reviewer can be: a) either one MFT user who, representing the Selection Committee, enters the consolidated decisions for each applicant on the Committee's behalf (described in step 5) b) or all MFT users as Selection Committee members entering their individual scores to each application (described in step 4a-4d)	
4b	Assess CFEI as reviewer	Click on the 'Shortlist tab (1)' to be directed to the applications to be reviewed. Click on the 'Application ID (2) hyperlink to be directed to the CSO's application		
4c-4d	Assess CFEI as reviewer	User can view a summary of the CSOs profile (1). Click on 'Download (2)' to download the CSOs concept note. Click on 'Add Review (3)' to add scores to the CSO's application. Review the 'Criteria (1)' and enter 'Your score (2)'. You can optionally add 'Notes (3)' and click 'Save'	If the criteria are weighted, the score cannot total more than the number set out in the criteria. If the criteria are not weighted, the total score per criteria cannot be more than 100. To edit your scores, click 'edit review'. Once all applications are assessed, then you can click on 'complete assessment' - 4d (1) & (2)	
OR	5	Assess Application on behalf of a Committee	Review the 'Criteria (1)' and enter 'Your score (2)'. Click that you confirm that the score is entered on behalf of the Selection Committee (3) in case only one reviewer was added to the CFEI.	You will have to add scores for each application as per the Committee's decision. Once all applications are assessed, then you can click on 'complete assessment'.


Steps	Description	Action	Notes
6	Compare scores	Optional: To compare the scores of applicants, click on the <i>check boxes (1)</i> for the organizations you want to compare and click on the <i>'Compare (2)'</i> icon.	In the <i>'Compare modal (3)'</i> you can view the CSO's score on the application as well as a few details from their profile.
7	Recommend a Partner	Click on <i>'Recommend (1)'</i> to recommend a partner for selection	More than one partner can be recommended
8a	Review Summary and Selection	Step for the PAM user: once the partner is recommended, go to the <i>'Results (1)'</i> tab. On this tab, the <i>'Recommended Partner (2)'</i> name is displayed. Click on <i>'Add summary (3)'</i> . In the Add Review Summary modal, enter you <i>"Comment (1)'</i> and optionally upload a file (2) and click <i>'Ok (3)'</i> Click on <i>'Send for Decision (4)'</i>	Once the PAM user clicks send for decision the results cannot be edited any longer. The meeting minutes of the Selection Committee meeting can be uploaded here. Once PAM user clicks on <i>'Send for Decision (4)'</i> , the recommendation will be sent to the focal point in order to collect approval from head of office/representative for the selection.
8b	Review Summary and Selection	Step for the MFT user focal point: you can <i>'Select (1)'</i> the recommended partner Enter the <i>'Justification (1)'</i> and click <i>'Submit (2)'</i>	You will receive a notification from the PAM user that a recommended partner was sent for decision – once the decision is reached from head of office/representative you can click <i>'Select'</i> ; Important: the <i>'Select'</i> button will be enabled only if the partner is verified. Please contact IPMS if the partner needs to be verified (🟢 icon has to be green). Once selected, the partner will receive an e-mail notification about the selection. The partner has to accept the sent <i>'offer'</i> online in their view in order to enable the CfEI for finalization from UNHCR's end.


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STEPS 1 & 2


UNPP





 Dashboard

 Partnership Opportunities

 Partners

 Reports

 Resource Library

OPEN SELECTION

APPLICATIONS 2

3 Closed/Under Review

FINALIZE

< The standard Lorem Ipsum passage,

OVERVIEW
REQUESTS FOR ADDITIONAL INFORMATION/CLARIFICATION
SHORTLIST
RESULTS

Search

Country

Location




Sector & Area of Specialization







Populations of concern

Type of Organization

CLEAR
SUBMIT

3 items selected

Organization's Legal Name	Type of Organization	Application ID	Status	
<input checked="" type="checkbox"/> Afghan Women's Network 	National NGO	1895	● Pending	  
<input checked="" type="checkbox"/> Association for Afghan Development 	National NGO	1894	● Pending	
<input checked="" type="checkbox"/> Youth Network for the Rehabilitation of Afghanistan 	National NGO	1893	● Pending	

Rows per page: 10 | 1-3 of 3

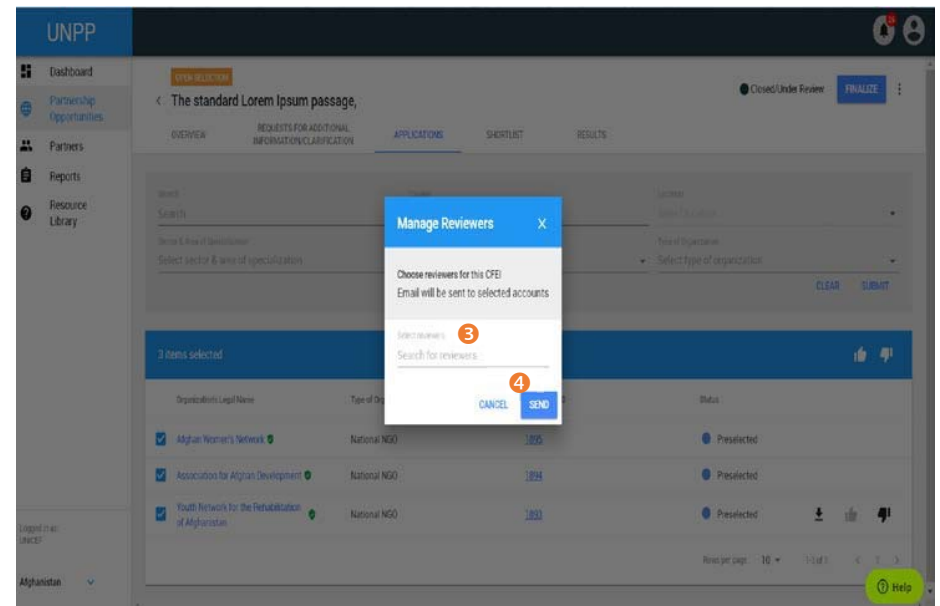
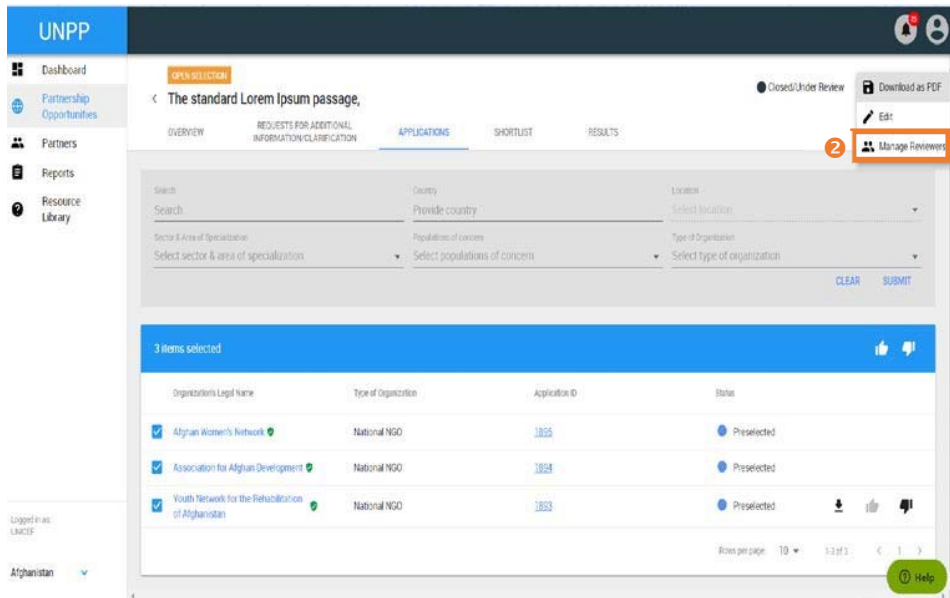
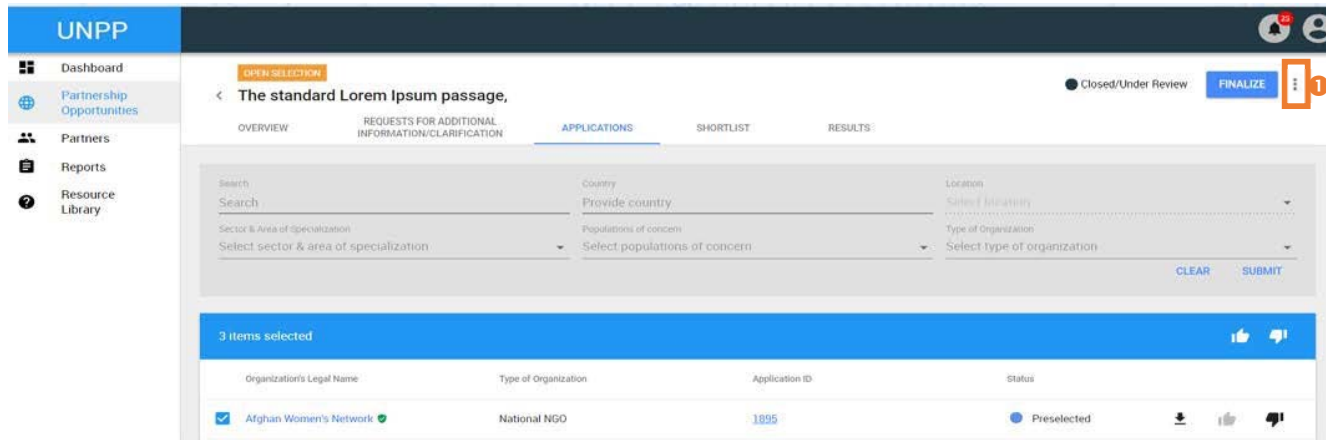
Logged in as: UNICEF

Afghanistan
▼

Help

Steps	Description	Action	Notes
3	Reviewers	To add reviewers to your CFEI, click on the <i>'vertical ellipses (1)'</i> next to the finalize button. In the dropdown, select <i>'Manage Reviewers (2)'</i> Enter the names of the reviewers in the <i>'modal (3)'</i> and click <i>'Send (4)'</i>	The CFEI creator or the focal point can add the focal point as a reviewer if the focal point is part of the assessment team but reviewer can be other MFT user as well. Reviewers can be MFT users only. The user's must be assigned these roles in the system for their names to be displayed. Reviewers will be sent an email and in-app notification. It is advised to add reviewers after you have shortlisted the applications.

STEP 3



Steps	Description	Action	Notes
4a	Assess CFEI as reviewer	In the <i>dashboard</i> (1), scroll down to ' <i>List of concept notes requiring your scoring</i> (2)'. Click on the <i>CFEI ID hyperlink</i> (3) to be directed to the CFEI	Reviewer can be: a) either one MFT user who, representing the Selection Committee, enters the consolidated decisions for each applicant on the Committee's behalf b) or all MFT users as Selection Committee members entering their individual scores to each application

STEP 4a

The screenshot displays the UNPP dashboard interface. On the left, a navigation menu includes 'Dashboard' (highlighted with a red box and '1'), 'Partnership Opportunities', 'Partners', 'Reports', and 'Resource Library'. The main content area features a top navigation bar with 'UNPP', a notification bell, and a user profile icon. Below the navigation bar, there are several widgets: a line chart showing data from 10/29 to 11/09; two summary cards for 'Number of New Calls for Expressions of Interest' (24) and 'Number Of Concept Notes to Score' (3); and a list of organization types with their respective counts: Community Based Organization (CBO) 14, National NGO 43, International NGO (INGO) 29, Academic Institution 3, and Red Cross/Red Crescent Movement 2. The central section is titled 'List of Concept Notes requiring your scoring' (highlighted with a red box and '2') and shows '1-1 of 1 results'. A table below lists the results with columns for Project Title, CFEI, Number of Applications, and Notification of results deadline. The CFEI 'CEE/AFG/2018/012' (highlighted with a red box and '3') is the only entry shown. The bottom of the dashboard includes a 'Logged in as: UNICEF' indicator, a location dropdown set to 'Afghanistan', and a 'Help' button.

Steps	Description	Action	Notes
4b	Assess CFEI as reviewer	Click on the 'Shortlist tab (1)' to be directed to the applications to be reviewed. Click on the 'Application ID (2)' hyperlink to be directed to the CSO's application	

STEP 4b

The screenshot shows the UNPP interface. On the left is a navigation menu with options: Dashboard, Partnership Opportunities, Partners, Reports, and Resource Library. The main content area is titled 'OPEN SELECTION' and shows a breadcrumb trail: < Lorem Ipsum is simply dummy text of the printing and typesetting industry. The 'SHORTLIST' tab is highlighted with a red box and a '1' in a red circle. Below the tabs is a table with 3 results. The 'Application ID' column is highlighted with a red box and a '2' in a red circle. The table contains the following data:

Organization's Legal Name	Type of Organization	Application ID	Your score
Alghan Women's Network	National NGO	1892	
Association for Afghan Development	National NGO	1891	
Youth Network for the Rehabilitation of Afghanistan	National NGO	1890	

At the bottom left, it says 'Logged in as: UNICEF' and 'Afghanistan'. At the bottom right, there is a 'Help' button.

Steps	Description	Action	Notes
4c	Assess CFEI as reviewer	User can view a summary of the CSOs profile (1). Click on 'Download (2)' to download the CSOs concept note. Click on 'Add Review (3)' to add scores to the CSO's application Review the 'Criteria (1)' and enter 'Your score (2)'. You can optionally add 'Notes (3)' and click 'Save'	If the criteria are weighted, the score cannot total more than the number set out in the criteria. If the criteria are not weighted, the total score per criteria cannot be more than 100. It is recommended that notes be added by the reviewer as it helps identifying the best candidate. To edit your scores, click 'edit review'.

STEP 4c

The screenshot shows the UNPP application review interface. On the left is a navigation menu with 'Partnership Opportunities' selected. The main content area is titled 'Application from: Afghan Women's Network'. It features a 'Profile summary' section (1) with fields for Partner name, ID, organization type, country, location, and head of organization. To the right is a 'Concept Note' section (2) with a 'DOWNLOAD' button. In the top right corner, there is an 'ADD REVIEW' button (3) with a notification icon.

The screenshot shows the 'Add review of the application' modal window. It displays a table of criteria for scoring, including 'Relevance of proposal to achieving expected results', 'Sector expertise and experience', and 'Sustainability of intervention'. There is also a 'Notes (optional)' field and 'CANCEL' and 'SAVE' buttons.

Criteria (1)	Your score (2)
Relevance of proposal to achieving expected results Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.	Score... /25
Sector expertise and experience Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.	Score... /50
Sustainability of intervention	Score... /25

Notes (optional) (3)
Enter any notes/comments

CANCEL (4) SAVE

Steps	Description	Action	Notes
4d	Complete Assessment	When all the reviews are complete, the reviewer can see their 'Scores (1)' and click 'Complete Assessment (2)'	Once 'complete assessment' is clicked, scores cannot be edited any longer

STEP 4d

The screenshot shows the UNPP interface. On the left is a navigation menu with options: Dashboard, Partnership Opportunities, Partners, Reports, and Resource Library. The main content area is titled 'OPEN SELECTION' and shows a 'SHORTLIST' view. At the top, there is a text placeholder: 'Lorem Ipsum is simply dummy text of the printing and typesetting industry.' Below this are tabs for 'OVERVIEW', 'SHORTLIST', and 'RESULTS'. A blue button labeled 'COMPLETE ASSESSMENT' with a red '2' is located in the top right of the results area. Below the button is a table with 3 results. The table has columns for 'Organization's Legal Name', 'Type of Organization', 'Application ID', and 'Your score'. The 'Your score' column is highlighted with a red box and a red '1'. The table data is as follows:

Organization's Legal Name	Type of Organization	Application ID	Your score
Afghan Women's Network	National NGO	1892	75
Association for Afghan Development	National NGO	1891	82
Youth Network for the Rehabilitation of Afghanistan	National NGO	1890	86

At the bottom of the table, there is a 'Rows per page' dropdown set to 10 and a '1-3 of 3' indicator. A 'Help' button is visible in the bottom right corner. The user is logged in as UNICEF and the location is set to Afghanistan.

Steps	Description	Action	Notes
5	Assess Application on behalf of a Committee	Review the 'Criteria (1)' and enter 'Your score (2)'. Click that you confirm that the score is entered on behalf of a the Selection Committee (3) in case you are the only one reviewer added to the given CFEI.	You will have to add scores for each application as per the Committee's decision. Once all applications are assessed, you can click complete assessment

STEP 5

Add review of the application
✕

You are reviewing application of: Afghan Women's Network

<p>Criteria 1</p> <hr/> <p>Sector expertise and experience <small>Contrary to popular belief, Lorem Ipsum is not simply random text.</small></p> <hr/> <p>Relevance of proposal to achieving expected results <small>Contrary to popular belief, Lorem Ipsum is not simply random text.</small></p>	<p>Your score 2</p> <hr/> <p>35 /50</p> <hr/> <p>36 /50</p>
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Notes (optional) 3

Enter any notes/comments

I confirm that these scores are entered on behalf of review committee 4

CANCEL 5 SAVE

Steps	Description	Action	Notes
6	Compare scores	Optional: To compare the scores of applicants, click on the <i>check boxes (1)</i> for the organizations you want to compare and click on the ' <i>Compare (2)</i> ' icon.	In the ' <i>Compare modal (3)</i> ' you can view the CSO's score on the application as well as a few details from their profile.

STEP 6

3 Items selected

Organization's Legal Name	Type of Organization	Application ID	Your score	Average score	Recommend Partner
<input checked="" type="checkbox"/> Afghan Women's Network	National NGO	1895	71	71.00	RECOMMEND
<input checked="" type="checkbox"/> Association for Afghan Development	National NGO	1894	75	75.00	RECOMMEND
<input checked="" type="checkbox"/> Youth Network for the Rehabilitation of Afghanistan	National NGO	1893	85	85.00	RECOMMEND

Partner	Afghan Women's Network	Association for Afghan Development
Concept Note Id	1895	1894
Average score	71	75
Verification status	✓ Verification Passed	✓ Verification Passed
Flagging status	0 0 1 0	0 0 0 0
Year of Establishment	2015	2011
UN Experience	WFP	UNHCR, UNICEF, WFP, OT
Annual Budget(USD)	Less than \$500,000	\$2,000,001 to \$10,000,000

DOWNLOAD

Steps	Description	Action	Notes
7	Recommend a Partner	Click on 'Recommend (1)' to recommend a partner for selection	More than one partner can be recommended

STEP 7

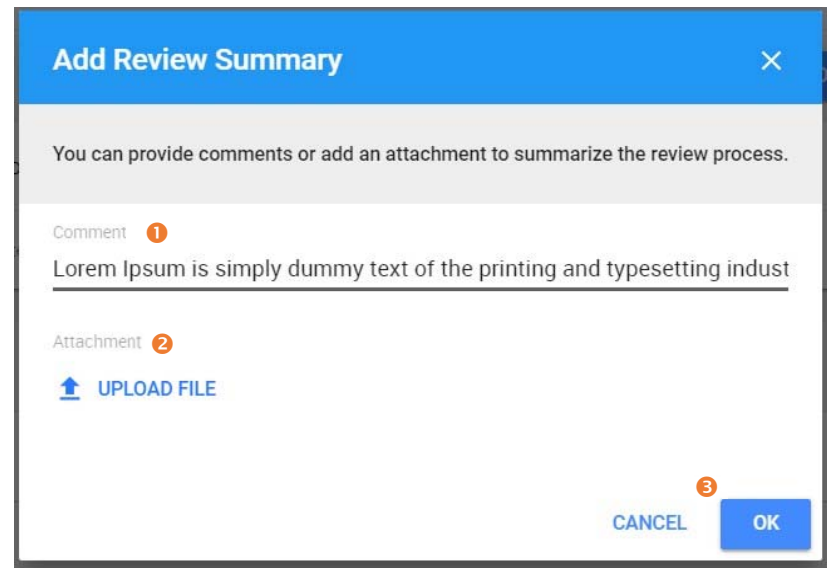
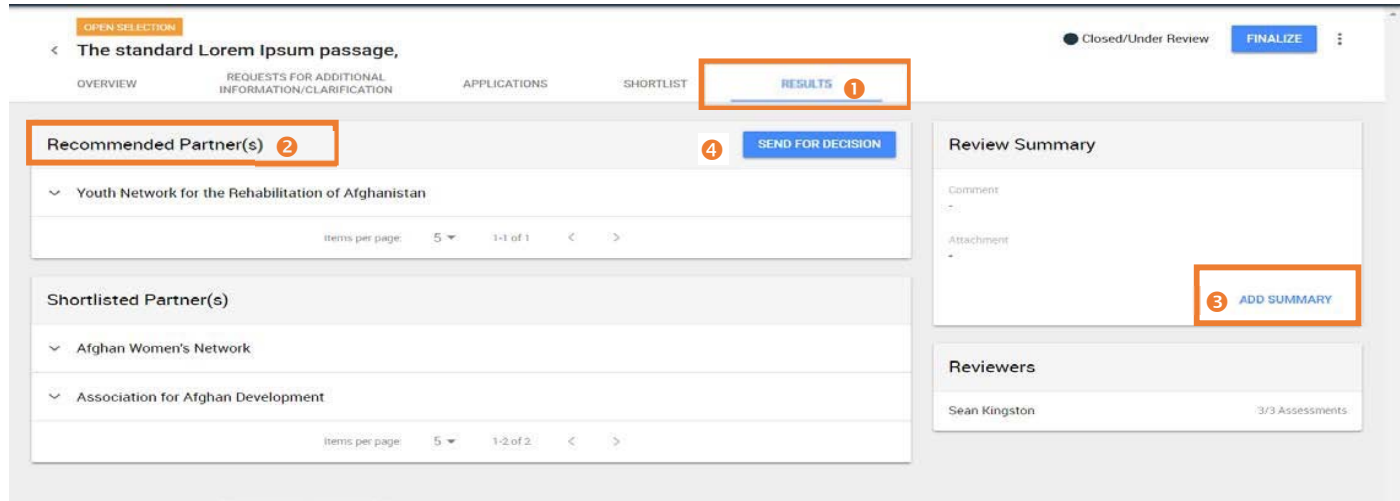
The screenshot shows a web application interface for partner selection. At the top, there is a header with 'OPEN SELECTION' and a status indicator 'Closed/Under Review' with a 'FINALIZE' button. Below the header, there is a breadcrumb trail: '< The standard Lorem Ipsum passage,'. A navigation menu includes 'OVERVIEW', 'REQUESTS FOR ADDITIONAL INFORMATION/CLARIFICATION', 'APPLICATIONS', 'SHORTLIST', and 'RESULTS'. A grey box on the right says 'ASSESSMENT COMPLETED'. A blue bar indicates '1 items selected'. The main content is a table with columns: Organization's Legal name, Type of Organization, Application ID, Your score, and Average score. Three rows are shown, with the third row selected. A 'Recommend Partner' button is highlighted for the selected row.

Organization's Legal name	Type of Organization	Application ID	Your score	Average score
<input type="checkbox"/> Afghan Women's Network	National NGO	1895	71	71.00
<input type="checkbox"/> Association for Afghan Development	National NGO	1894	75	75.00
<input checked="" type="checkbox"/> Youth Network for the Rehabilitation of Afghanistan	National NGO	1893	85	85.00

Rows per page: 10 | 1-3 of 3 | < 1 >

Steps	Description	Action	Notes
8a	Review Summary and Selection	Step for the PAM user: once the partner is recommended, go to the 'Results (1)' tab. On this tab, the 'Recommended Partner (2)' name is displayed. Click on 'Add summary (3)'. In the Add Review Summary modal, enter you "Comment (1)" and optionally upload a file (2) and click 'Ok (3)'. Click on 'Send for Decision (4)'	Once the PAM user clicks send for decision the results cannot be edited any longer. The meeting minutes of the Selection Committee meeting can be uploaded here. Once PAM user clicks on 'Send for Decision (4)', the recommendation will be sent to the focal point in order to collect approval from head of office/representative for the selection.

STEP 8a



Steps	Description	Action	Notes
8b	Review Summary and Selection	Step for the MFT user focal point: you can 'Select (1)' the recommended partner Enter the 'Justification (1)' and click 'Submit (2)'	You will receive a notification from the PAM user that a recommended partner was sent for decision – once the decision is reached from head of office/representative you can click 'Select'; Important: the 'Select' button will be enabled only if the partner is verified. Please contact IPMS if the partner needs to be verified (✔ icon has to be green). Once selected, the partner will receive an e-mail notification about the selection. The partner has to accept the sent 'offer' online in their view in order to enable the CfEI for finalization from UNHCR's end.

STEP 8b

The screenshot displays a web application interface for partner selection. At the top, there is a breadcrumb trail: **OPEN SELECTION** > **Lorem Ipsum is simply dummy text of the printing and typesetting industry.** The status is **Closed/Under Review** and there is a **FINALIZE** button. Navigation tabs include **OVERVIEW**, **REQUESTS FOR ADDITIONAL INFORMATION/CLARIFICATION**, **APPLICATIONS**, **SHORTLIST**, and **RESULTS**.

The main content area is divided into two sections:

- Recommended Partner(s)**: A list containing one partner: **Youth Network for the Rehabilitation of Afghanistan**. A red circle with the number '1' is next to the partner name, and a blue **SELECT** button is to its right. Below the list, it shows 'Items per page: 5' and '1-1 of 1'.
- Shortlisted Partner(s)**: A list containing two partners: **Afghan Women's Network** and **Association for Afghan Development**.

On the right side, there is a **Review Summary** panel with a **Comment** field containing the text: "Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum." Below the comment field is an **Attachment** section.

A modal dialog box is overlaid on the interface, titled **Are you sure you want to select this partner?** with a close button (X). The dialog contains the text: "Please confirm you want to select this partner. Email with notification will be sent to selected partner." Below this is a **Justification** field with a red circle and the number '1' next to it, containing the text: "Partner gave best justification". At the bottom right of the dialog are two buttons: **CANCEL** and **SUBMIT**, with a red circle and the number '2' next to the **SUBMIT** button.