

Retention of the Partnership

Objective: as per UNHCR's policy on 'Selection and Retention of Partners for Project Partnership Agreements' the partnership can be retained for a 2nd, 3rd and 4th year with a simplified decision making process. The '*Direct Selection/Retention*' menu on the Portal is the online tool for managing and recording this process.

A partner is notified when they have been retained for further partnership with a UNHCR. It provides them information on the nature of the partnership (location, activity, sector etc.) and offers them the opportunity to accept or reject the partnership offer.

User roles: The below steps can be performed with a collaboration of a **PAM user (steps 1-4)** and an **MFT user (step 5)**. The last step (**step 6**) of finalization can be performed by any of the two roles.

Steps	Description	Action	Notes
1	Direct Selection/ Retention Page	<p>Log in as a PAM user, On the left navigation bar, click on the '<i>Partnership Opportunities</i>' (1) icon to access the CFEIs page.</p> <p>Click on the '<i>Direct Selection/Retention</i>' (2) tab</p> <p>Click on the '<i>New Direct Selection/Retention</i>' (3) icon to create a new Direct Selection. A pop up dialogue box to enter the necessary information to create a new Direct Selection will open when you click on this icon.</p>	<p><u>PAM user can perform this step only.</u></p> <p>In the results section you will see previous Direct Selections/Retentions that were created. They will show the project title, the UN agency offering the Direct Selection, the Partner that received the Direct Selection, the country of implementation, the Sector for the project, and the Direct Selection source as well as the status of the opportunity.</p> <p>In Direct Selection Source, UNI indicates that it was a UN Initiated Direct Selection (e.g. retention). UCN indicates that it was an Unsolicited Concept Note that converted to a Direct Selection for a partnership opportunity. (4)</p>
2a	Create Retention	<p>Enter the '<i>Project Title</i>' (1) for the Retention you are creating.</p> <p>Enter the name of the country the project will be located (2). Drop 'pins' on the location(s) that project will operate.</p>	<p>To drop pins, you can enter the names and locations of the project in the search box on the map, and you will be directed to the location. Click on the location to drop a pin. To unpin the location, click on the pin to make it disappear. Click on 'Add new' (3) to add a multi country opportunity.</p>
2b	Create Retention	<p>Enter the '<i>Project/Programme Focal Point(s)</i>' (1) from the list of existing users in your operation/division. Select the sector(s) (2) associated with the Direct Selection opportunity.</p> <p>Select the areas of specialization (3) in each sector. Enter the 'Project Background' (6) for the Retention.</p>	<p>Project focal points can only be entered from the list of existing MFT users on UNPP.</p> <p>You can enter multiple sectors and areas of specialization for a Direct Selection. Click 'Add New' (5) to add multiple sectors. To delete a sector click on the trashcan image (4). Click on multiple areas of specialization in a sector to add them in the Retention.</p>
2c	Create Retention	<p>Enter the '<i>Expected Results</i>' (1) that the partnership aims to deliver.</p> <p>In the '<i>Other Information</i>' (2) section, you have the option to enter any additional relevant information related to the Retention.</p> <p>In the '<i>Estimated Start Date</i>' (3) enter the date the project is estimated to start.</p> <p>In the '<i>Estimated End Date</i>' (4) enter the date the project is estimated to end.</p> <p>In the '<i>Partner</i>' (5) section, select a partner from the list of partners registered on the Portal you would like to retain as per the decision of retention of partnership.</p> <p>In the '<i>Justification for Direct Selection/Retention</i>' (6) section enter the justifying reasons for selecting the partner to implement the project instead of other partners. In the '<i>Justification Summary</i>' (7) enter a summary of your partnership selection justification and upload (8) the underlying decision for the retention.</p>	<p>You can only select a partner for Direct Selection that is registered on UNPP and has already been verified. To verify a partner, see the FAQ – verification should be done by IPMS (contact epartner@unhcr.org).</p> <p>To add additional justifications click on the 'Add New' icon (8).</p> <p>Upload the decision for Retaining the partnership for 2nd or 3rd or 4th year.</p> <p>Selected partner will not be notified before sending (publishing) the retention.</p>

3	Edit Retention	On the left navigation bar, click on the <i>'Partnership Opportunities'</i> (1) icon to access the CFEIs page. Click on the <i>'Direct Selections/Retention'</i> (2) tab. Click on the <i>'Direct Selection/Retention'</i> (3) project title for the Retention you want to edit.	When you click on the Retention project title (3) you will be directed to the Direct Selection/Retention project overview page. You can also use the filters to search for your Retention.
4a	Edit Retention	Click on the three vertical dots (1) and click on the <i>'Edit'</i> icon (2). You will be able to align and correct the earlier saved draft of the retention details.	When you click on Edit (2) a pop up dialogue box will open to provide the editing options.
4b	Send for publication	Send the saved draft retention to the focal point for publication. (1)	In order the retention to be active, it has to be sent to the focal point for publication. Selected partner will not be notified before publishing the retention. The retention will be sent to the focal point for review and publishing. Once sent to the focal point PAM user cannot make edits to the retention. If any major error was made, the retention can be cancelled and a new one created.
5	Publish the retention	Log in as an MFT user and find direct link in a notification about the retention (DSR) that you need to review (1) Edit and modify a few details if necessary (2) Publish the retention (3)	The given retention is also available from the <i>'Partnership Opportunities'</i> and clicking on <i>'Direct Selection/Retention'</i> tab, searching for the location, and project title. Only the project period and the focal point can be edited and modified – if other values have to be changed, the retention has to be cancelled and has to be created. The given retention can be publish only, if the selected partner has verified status – to verify a partner, see the FAQ – verification should be done by IPMS (contact epartner@unhcr.org). Selected partner is notified through the portal about retaining the partnership for 2 nd /3 rd /4 th year.
6	Finalize Direct Selection	Login as MFT user or PAM user (both roles can perform finalization). In the Retention project overview page. Click on the <i>'Finalize'</i> (1) icon. Add a justification for completing the Retention process and select the year for the given retention (2) Click on the <i>'Finalize'</i> icon to finalize the Direct Selection. (3)	You cannot select <i>'Finalized-Partner Accepted'</i> unless the partner has accepted the Retention. Until partner's acceptance, <i>'Waiting for Partner's acceptance.'</i> Message appears in <i>'selected partner'</i> box. If a partner declines the partnership retention opportunity, you can select <i>'Finalized- No Successful Applicant'</i> . Once you click on <i>'Finalize'</i> no further changes can be made to the Direct Selection.

Steps	Description	Action	Notes
1	Direct Selection/Retention Page	<p>Log in as a PAM user, On the left navigation bar, click on the <i>'Partnership Opportunities'</i> (1) icon to access the CFEIs page.</p> <p>Click on the <i>'Direct Selection/Retention'</i> (2) tab</p> <p>Click on the <i>'New Direct Selection/Retention'</i> (3) icon to create a new Direct Selection. A pop up dialogue box to enter the necessary information to create a new Direct Selection will open when you click on this icon.</p>	<p><u>PAM user can perform this step only.</u></p> <p>In the results section you will see previous Direct Selections/Retentions that were created. They will show the project title, the UN agency offering the Direct Selection, the Partner that received the Direct Selection, the country of implementation, the Sector for the project, and the Direct Selection source as well as the status of the opportunity.</p> <p>In Direct Selection Source, UNI indicates that it was a UN Initiated Direct Selection (e.g. retention). UCN indicates that it was an Unsolicited Concept Note that converted to a Direct Selection for a partnership opportunity. (4)</p>

STEP 1

The screenshot shows the UNPP interface. On the left, a navigation menu includes 'Partnership Opportunities' (highlighted with a red box and labeled '1'). The main header shows 'Partnership Opportunities' with three tabs: 'CALLS FOR EXPRESSIONS OF INTEREST', 'DIRECT SELECTION/RETENTION' (highlighted with a red box and labeled '2'), and 'UNSOLICITED CONCEPT NOTES'. On the right, a 'NEW DIRECT SELECTION' button is highlighted with a red box and labeled '3'. Below the header is a search and filter section with fields for 'Search', 'Country', 'Location', 'Sector & Area of Specialization', 'Status', 'Agency', and 'DS/R Source'. A 'SEARCH' button is at the bottom right of this section. Below the search section, a table displays '1-10 of 72 results'. The table has columns for Project Title, UN Agency, Partner, Country, Sector & Area of Specialization, DS/R Source, and Status. The first row shows a project titled 'Coastal rural development in Villages' by UNICEF, with partner 'Americans for Africa-Kenya', in Kenya, under the sector 'Increase of maize yield in rural Kenya 2', with source 'UNI' (labeled '4') and status 'Draft'.

Project Title	UN Agency	Partner	Country	Sector & Area of Specialization	DS/R Source	Status
Coastal rural development in Villages	UNICEF	Americans for Africa-Kenya	Kenya	Increase of maize yield in rural Kenya 2	UNI 4	Draft
Increase of maize yield in rural Kenya 2	UNICEF		Kenya		UNI	Draft
Increase of maize yield in rural Kenya JAN 18	UNICEF		Kenya		UNI	Draft

Steps	Description	Action	Notes
2a	Create Retention	Enter the 'Project Title' (1) for the Retention you are creating. Enter the name of the country the project will be located (2). Drop 'pins' on the location(s) that project will operate.	To drop pins, you can enter the names and locations of the project in the search box on the map, and you will be directed to the location. Click on the location to drop a pin. To unpin the location, click on the pin to make it disappear. Click on 'Add new' (3) to add a multi country opportunity.
2b	Create Retention	Enter the 'Project/Programme Focal Point(s)' (1) from the list of existing users in your operation/division. Select the sector(s) (2) associated with the Direct Selection opportunity. Select the areas of specialization (3) in each sector. Enter the 'Project Background' (6) for the Retention.	Project focal points can only be entered from the list of existing MFT users on UNPP. You can enter multiple sectors and areas of specialization for a Direct Selection. Click 'Add New' (5) to add multiple sectors. To delete a sector click on the trashcan image (4). Click on multiple areas of specialization in a sector to add them in the Retention.

STEP 2a

Create new direct selection
✕

This is a direct selection.
In order to save this form, you will need to identify the partner(s).

Project Title 1

School Nutrition Program in Nairobi

Project Location

Country 2

Kenya

Choose location(s) for this country - pick location(s) from the map. Remove locations by clicking the markers. HIDE MAP



3 + ADD NEW

STEP 2b

Project/Programme Focal Point(s) 1

Jack Sparrow ✕

Sector(s) and area(s) of specialization

Sector 2

Nutrition

Area(s) of specialization 3

✕ Nutrition - general

Sector 4

Education

Area(s) of specialization

✕ School meals

5 + ADD NEW

Project Background 6

School feeding programs in urban areas are part of UNICEF's 2018 priorities, to address nutrition deficiencies in low income communities. The proposed project should focus on school feeding programs in schools servicing children in Kibera and Huruma areas of Nairobi.

Steps	Description	Action	Notes
2c	Create a Direct Selection	<p>Enter the 'Expected Results' (1) that the partnership aims to deliver.</p> <p>In the 'Other Information' (2) section, you have the option to enter any additional relevant information related to the Retention.</p> <p>In the 'Estimated Start Date' (3) enter the date the project is estimated to start.</p> <p>In the 'Estimated End Date' (4) enter the date the project is estimated to end.</p> <p>In the 'Partner' (5) section, select a partner from the list of partners registered on the Portal you would like to retain as per the decision of retention of partnership.</p> <p>In the 'Justification for Direct Selection/Retention' (6) section enter the justifying reasons for selecting the partner to implement the project instead of other partners. In the 'Justification Summary' (7) enter a summary of your partnership selection justification and upload (8) the underlying decision for the retention.</p>	<p>You can only select a partner for Direct Selection that is registered on UNPP and has already been verified. To verify a partner, see the FAQ – verification should be done by IPMS (contact epartner@unhcr.org).</p> <p>To add additional justifications click on the 'Add New' icon (8).</p> <p>Upload the decision for Retaining the partnership for 2nd or 3rd or 4th year.</p> <p>Selected partner will not be notified before sending (publishing) the retention.</p>

STEP 2c

Expected Results ¹

Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Other information (optional) ²

Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Estimated Start Date ³ Estimated End Date ⁴

01 Jan 2020 31 Dec 2020

Select Partner

Partner

DanChurchAid | Kenya ⁵ X

Justification for Direct Selection/Retention ⁶

X Partner retention

Justification Summary ⁷

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Attachment (Optional) ⁸

Decision_tpx0OwV.docx X

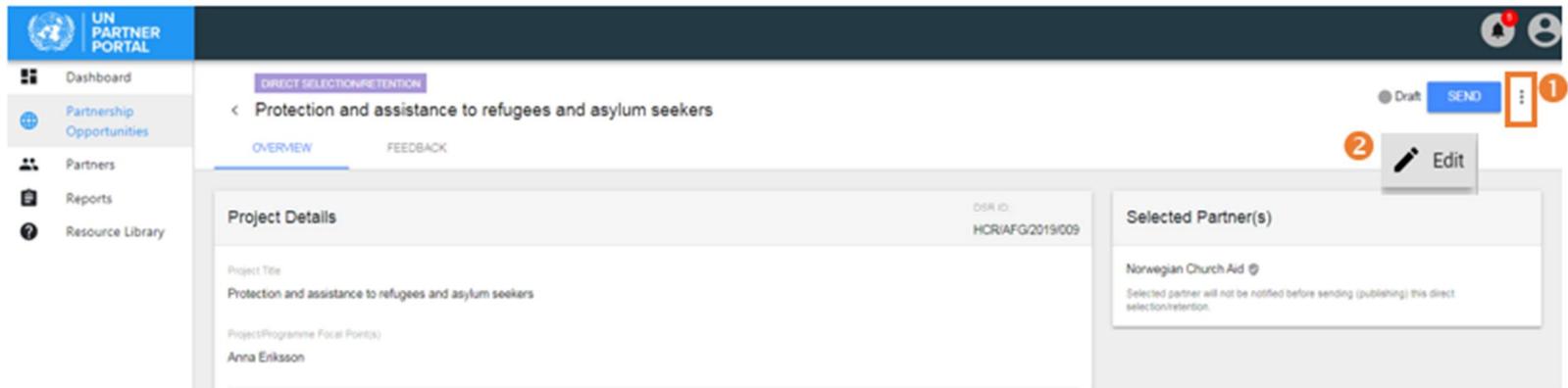
Steps	Description	Action	Notes
3	Edit Retention	On the left navigation bar, click on the 'Partnership Opportunities' (1) icon to access the CFEIs page. Click on the 'Direct Selections/Retention' (2) tab.	When you click on the Retention project title (3) you will be directed to the Direct Selection/Retention project overview page.

STEP 3

The screenshot shows the UN Partner Portal interface. On the left is a navigation bar with 'Partnership Opportunities' highlighted (1). The main content area has three tabs: 'CALLS FOR EXPRESSIONS OF INTEREST', 'DIRECT SELECTION/RETENTION' (2), and 'UNSOLICITED CONCEPT NOTES'. Below the tabs is a search filter section with fields for Search (containing 'protection'), Country (containing 'Afghanistan'), Location (dropdown), Sector & Area of Specialization (dropdown), Status (radio buttons for Unpublished, Active, Finalized), Agency (containing 'UNHCR'), and DS/R Source (dropdown). A 'SEARCH' button is present. Below the filters, it says '1-1 of 1 results'. A table displays the results with columns: Project Title, UN Agency, Partner, Country, Sector & Area of Specialization, DS/R Source, and Status. The first row is highlighted (3) and contains: 'Protection and assistance to refugees and asylum seekers', UNHCR, Norwegian Church Aid, Afghanistan, Livelihoods, Protection, UNI, and Draft. At the bottom right, it says 'Rows per page: 10' and '1 of 1'.

Steps	Description	Action	Notes
4a	Edit Retention	Click on the three vertical dots (1) and click on the 'Edit' icon (2).	When you click on Edit (2) a pop up dialogue box will open to provide the editing options.

STEP 4a



Steps	Description	Action	Notes
4b	Send for publication	Send the saved draft retention to the focal point for publication. (1)	In order the retention to be active, it has to be sent to the focal point for publication. Selected partner will not be notified before publishing the retention. The retention will be sent to the focal point for review and publishing. Once sent to the focal point PAM user cannot make edits to the retention. If any major error was made, the retention can be cancelled and a new one created.

STEP 4b

DIRECT SELECTION/RETENTION

< Protection and assistance to refugees and asylum seekers

● Draft **SEND** ⋮

1

OVERVIEW FEEDBACK

Project Details

Project Title
Protection and assistance to refugees and asylum seekers

Project/Programme Focal Point(s)
Anna Eriksson

Country

DSR ID:
HCR/AFG/2019/009

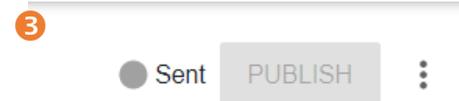
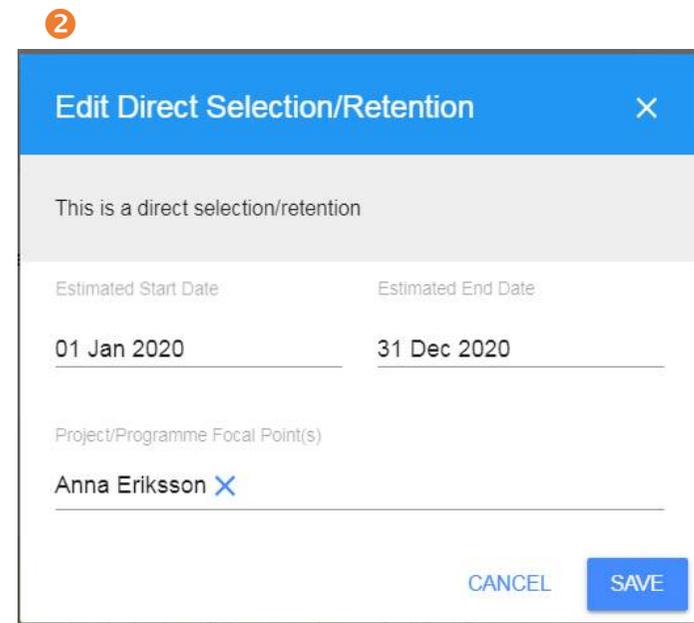
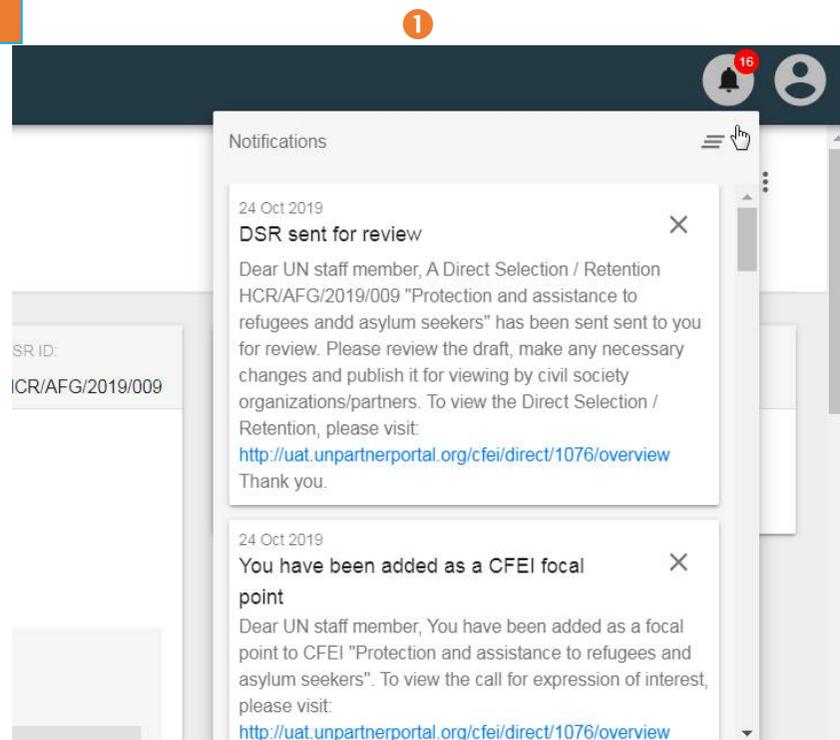
Selected Partner(s)

Norwegian Church Aid 🇳🇴

Selected partner will not be notified before sending (publishing) this direct selection/retention.

Steps	Description	Action	Notes
5	Publish the retention	<p>Log in as an MFT user and find direct link in a notification about the retention (DSR) that you need to review (1)</p> <p>Edit and modify a few details if necessary (2)</p> <p>Publish the retention (3)</p>	<p>The given retention is also available from the 'Partnership Opportunities' and clicking on 'Direct Selection/Retention' tab, searching for the location, and project title.</p> <p>Only the project period and the focal point can be edited and modified – if other values have to be changed, the retention has to be cancelled and has to be created.</p> <p>The given retention can be published only, if the selected partner has verified status – to verify a partner, see the FAQ – verification should be done by IPMS (contact epartner@unhcr.org). Selected partner is notified through the portal about retaining the partnership for 2nd/3rd/4th year.</p>

STEP 5



Steps	Description	Action	Notes
6	Finalize Direct Selection	<p>Login as MFT user or PAM user (both roles can perform finalization). In the Retention project overview page. Click on the 'Finalize' (1) icon.</p> <p>Add a justification for completing the Retention process and select the year for the given retention (2)</p> <p>Click on the 'Finalize' icon to finalize the Direct Selection. (3)</p>	<p>You cannot select 'Finalized-Partner Accepted' unless the partner has accepted the Retention. Until partner's acceptance, 'Waiting for Partner's acceptance.' Message appears in 'selected partner' box.</p> <p>If a partner declines the partnership retention opportunity, you can select 'Finalized- No Successful Applicant'.</p> <p>Once you click on 'Finalize' no further changes can be made to the Direct Selection.</p>

STEP 6

