Submit and Update Bilateral Fund Workplan

GrACE User Manual for National Focal Point

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1. Introduction


The National Focal Point (NFP) prepares the Bilateral Fund Workplan. It describes the proposed activities to be implemented under the Fund for Bilateral Relations for the duration of the fund and in consultation with the Donors. The Joint Committee for the Bilateral Fund (JCBF) then defines the Workplan and the NFP updates it at least once per year.

For further help and support, please contact grace.support@efta.int. You can find this user manual and other manuals on our website https://eeagrants.org/gracemanuals. Be sure to regularly check for updated versions.

2. Bilateral Fund Workplan in GrACE

The following represents the Bilateral Fund Workplan workflow in GrACE. The workflow is started either by the Country Officer or the NFP. Both parties can find the task in their dashboard. There is no fixed date for submission, but it should be in accordance with any annual updates. When the NFP has submitted the Workplan in GrACE, the FMO Country Officer reviews it.

The Joint Committee for Bilateral Funds (JCBF) members are representatives of the NFP, Ministry of Foreign Affairs of the Beneficiary State and the Ministries of Foreign Affairs of Iceland, Liechtenstein and Norway, represented by their respective Embassies. Representatives of the FMO serve as observers in the JCBF. The Workplan for the Bilateral Fund is prepared by the NFP in consultation with the Donors and submitted to the FMO through GrACE.

The FMO may return the Workplan to the NFP with comments. The NFP will then make any necessary changes and re-submit the Workplan to the FMO. The FMO reviews the Workplan once more and then validates the final version in GrACE. Keep in mind that bilateral initiatives will not appear in GrACE unless they are submitted separately from the Workplan.
3. Start the Bilateral Fund Workplan workflow

To start the workflow for the Bilateral Fund Workplan, click on ‘Initiate a new process’ under My tasks on your dashboard (1). Select ‘Update the Workplan of the Bilateral Fund’ (2) and click on Initiate the process (3).

This task can also be started when you are looking at the current workplan by clicking Initiate a new process (4).

A task page will appear once the process is initiated. To navigate through the different sections, click on the different titles under the Structured Data tab (1). You will register the relevant data and information in the Structured Data section. You can reassign the Update Workplan for Bilateral Fund to another user with the same role (2).
You can see a printable version of the Workplan that GrACE has created by clicking on the Preview tab. This document contains information currently registered under the Structured Data tab.

Until you press Submit, you have the possibility to Edit/Update/Save the information registered as many times as necessary.

4. Fill-in the Workplan

The Structured Data tab is composed of five tabs in which you will register the changes in the Workplan, in line with the template in Chapter 3:

- General text of the Workplan
- Bilateral Priority Programmes
- Open Calls
- Major activities
- Budget

The General tab (1) contains text boxes for the first three sections of the Workplan: Background, Main objective, and Implementation system. To fill in, click Edit on each section (2).

After you click Edit, the text editor opens. You can then type in or paste the formatted text in the field. You can also use the word processing bar to further format the text (3).

The field automatically resize according to the amount of text. Clicking Save (4) for each section edited will save the data and exit the edit mode. You must do this process individually for each of the three sections of the Workplan under the General tab.
The “Bilateral Priority Programmes” tab gives an overview of allocations of Bilateral Funds to programmes from the Memorandum of Understanding (MoU). The Bilateral Priority Programmes are automatically included in the Workplan template. Therefore, it is not possible to add new programmes or remove existing ones. You can, however, click on Edit to amend information about the programmes listed, i.e. in case of modifications of the MoU allocation, by selecting the checkbox in front of the programme short name. This will make a text box appear where you can add or remove information. You are also able to modify the figures in the column “JCBF allocation”, i.e. in case of Expressions of Interest.

The “Open Calls” tab shows the Bilateral Fund’s Open Calls, if any, approved by the JCBF. GrACE does not automatically include information about Open Calls. To add a call, click the Add button as highlighted in the picture below. To edit or remove a call, tick the box in front of the call, then click Edit or Remove.

Remember to click Save once information is added, edited, or removed to exit the Edit window.
The “Major activities” tab contains the pre-defined bilateral initiatives that the JCBF has approved. The same process as for the Open Calls applies, to Add, Edit or Remove bilateral initiatives. Remember to click Save once you have added, edited or deleted information.

![Image of the Major activities tab]

The Budget tab gives an overview of the allocations of Bilateral Funds that the JCBF has decided. Under this tab, the titles (Bilateral Priority Programmes, Open Calls and Major activities,) are set and not possible to change. The budget amounts for these titles are carried over from the corresponding tabs, and hence not possible to change in this tab. You can, however, edit the budget for “Activities carried out by the NFP” and “Pre-defined activities”. Additionally, it is possible to add or change comments for all titles by clicking on Edit in the upper right-hand corner:

![Image of the Budget tab]

You will be able to click and edit info in the Budget number column (1) as well as the Comments column (2). When finished, click Save (3).
Please see instructions for the tab “Bilateral Priority Programmes” for how to update JCBF budget allocation if you need to change this.

5. Submit the Workplan

After finalising the registration of information in all “Structured Data” tabs, select Send to Financial Mechanism Office (1) and then click Submit (2). The system will notify you in case there are empty textboxes. If this is the case, then you must fill them in before submitting the Workplan. Optionally, you can leave a comment for FMO.

The FMO Country Officer will receive a task to Review Workplan submission.
6. Update the Workplan further to FMO comments

In case further changes are needed, the FMO Country Officer will return the Update Workplan for Bilateral Fund task to the NFP. Accordingly, you will receive an Update Workplan for Bilateral Fund task in GrACE.

In the task details, you can access the document with comments from FMO (if any) in the section Secondary Documents:

Additionally, you can see the track changes/how many changes were made on which page under the View Changes tab:

In the “Comments” tab, you can view any comments left by FMO:

You can now edit the Workplan as shown above in Chapter 4 – Fill in the Bilateral Fund Workplan. When ready, you can submit the Workplan to FMO once more.
7. Updating the Workplan at a later stage

7.1. Amendment of the Workplan decided by the JCBF

In the previous steps we have shown how to submit the Workplan to the FMO.

To update a Workplan that has already been submitted and approved by the FMO, further to a decision by the JCBF to amend the Workplan (e.g. to include new initiatives or modify priorities), the NFP has the possibility to start the update Workplan workflow itself. You will find this option from your Dashboard by clicking Initiate a new process (1) and then select "Update the Workplan of the Bilateral Fund" (2). Click Initiate the process (3) to start it.

The new workflow will start, and you will once more find the task for submitting the Workplan on your dashboard as explained in the previous chapters of this user manual.

Inside the task of the update workflow, you can see the View Changes tab. This tab will show the number of changes and on which page they were made by comparing the previously submitted Workplan with the new edits.

When the updated Workplan is ready to be submitted, submit as explained in Submit the Workplan.

When you submit you will be asked at what time the new Workplan was adopted by the JCBF. Select the icon for the calendar (1), select the adoption date (2) and click on OK (3). It will now be submitted to the FMO.
7.2. Updating the Workplan with a technical modification

If there is a technical modification needed for the Workplan, the NFP can initiate this from the dashboard. Please see the steps described in the sections above on how to fill in the Workplan and submit it to the FMO. This option is relevant e.g. to correct clerical mistakes. Moreover, should a JCBF decide to approve the amended Workplan, e.g. once a year or at a JCBF meeting, the NFP could use this option to include in GrACE the individual modifications decided by the JCBF, and then submit all the changes in one go to the JCBF as described in 7.1.

8. View the Workplan

The final Workplan can be viewed under the Finance tab under the Bilateral Fund programme page (1). The latest version can either be previewed in GrACE (2) or downloaded as a Word document or PDF by clicking on the Download button in the right-hand corner (3).
To access older versions of the Workplan and/or to compare the latest version, first click the ‘Workplan’ tab (1). Then click the down-facing arrow of Document: Workplan for BF [Beneficiary State] 2014-2021 (2).
Under the “Versions” tab (3), tick the checkboxes of the versions you want to compare (4). Click on **Compare** to view the track changes merged into one document (5).

It is also possible to download older versions as a document by ticking the checkbox next to a version and then clicking **Download**.