Iceland Liechtenstein Norway grants

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GRACE Grants Administration and Collaboration Environment

Bid Form Submission

GrACE User Manual for Fund Operators

Version 1.0, November 2024

EEA and Norway Grants
Financial Mechanism Office
Grants Management Systems Unit
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Table of Contents

1. Introduction to GrACE

GrACE stands for Grants Administration and Collaboration Environment. The system supports the management of the EEA and Norwegian Financial Mechanisms 2014-2021 and 2021-2028. GrACE is used by the Donor and Beneficiary State entities and the Financial Mechanism Office (FMO). Users access GrACE through the website https://grace.eeagrants.org/.

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

2. About submitting a bid

To submit a bid for the role of Fund Operator (FO) for the Civil Society Fund (CSF) under the EEA and Norwegian Financial Mechanism 2021-2028, the Lead Bidder must first complete registration on the Bid Portal for Fund Operators. This portal provides essential guidance and resources for the bidding process and supports bidders throughout each phase of the application for the Fund Operator role.

The registration process is mandatory and enables access to GrACE, where the Lead Bidder will submit their formal proposal.

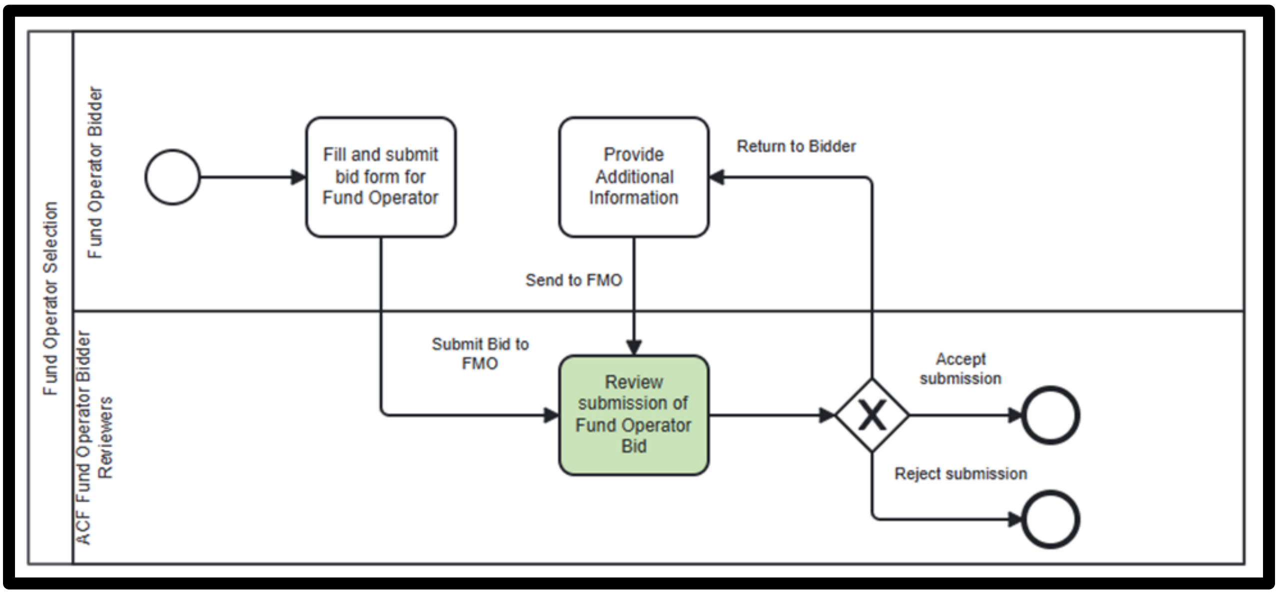
Bidders should review the Terms of Reference for each Beneficiary State, which explains the requirements and conditions for submitting a bid. For more information and guidelines, refer to the Fund Operator Manual. The submission process follows a timeline provided in the portal. Bidders are encouraged to check this timeline to ensure they submit on time and meet all CSF requirements.

If you have any questions or need further clarification about registering as a Lead Bidder, please use the Contact form on the Bid Portal for Fund Operator to reach out.

Please note that the programme details, projects and amounts and other information in the pictures in this user manual are fictitious and do not exist in real life. They are only for illustration purposes.

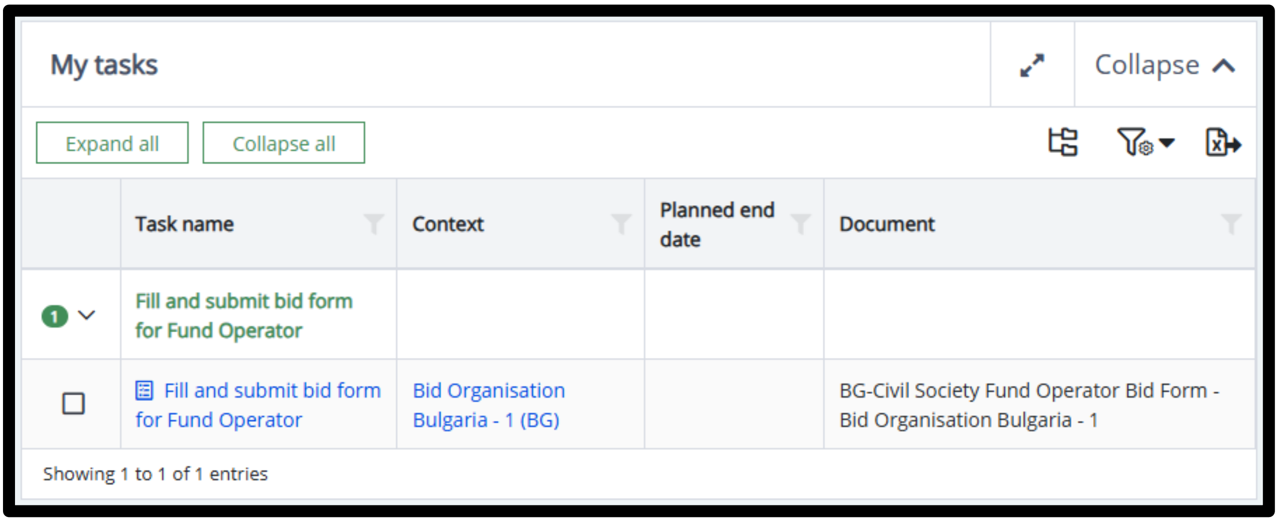
3. Filling in the form in GrACE

The workflow for the whole process in GrACE is illustrated in the following diagram:



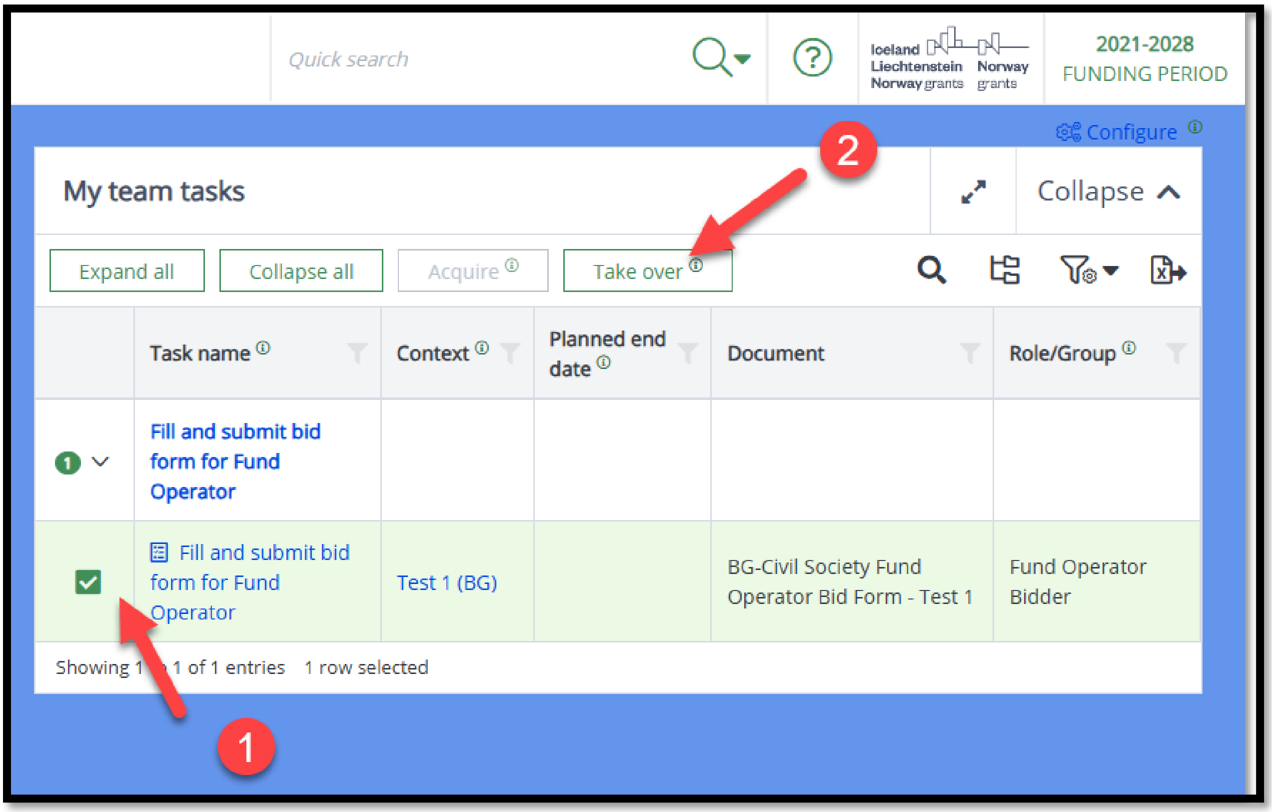
The bid process for the Lead Bidder organisation members begins when the Lead Bidder User receives an email notification with a new task assignment in GrACE. Upon logging into the system, the user will see the "Fill and submit bid form for Fund Operator" task displayed on the dashboard under their task list.

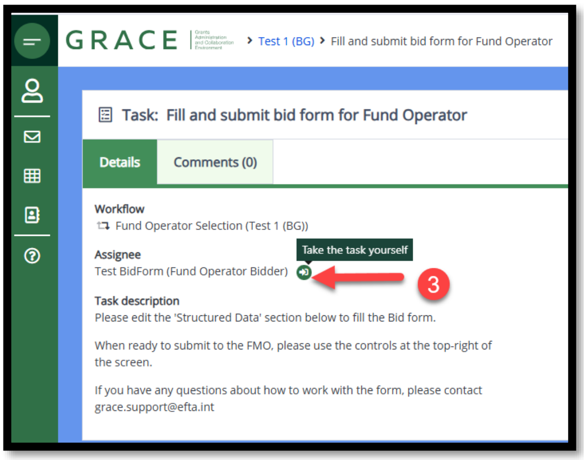
To proceed, click on the task name “Fill and submit bid form for Fund Operator”, in blue, on your dashboard. This will take you to the task-specific page, where you can access and complete the Bid Form, which we will explain in the next chapters.



The task is on the dashboard for the primary user set for your organisation for this role as a Fund Operator. Any of your colleagues who are also registered in GrACE can take over the task, so you can easily send the task back and forth to collaborate, although only 1 user can work on the form at the same time.

To take over a task, login to GrACE and on your dashboard, you will see the section “My teams tasks”. Check the box in front of the task you want to work on (1) and then click on the “**Take over**” button (2).





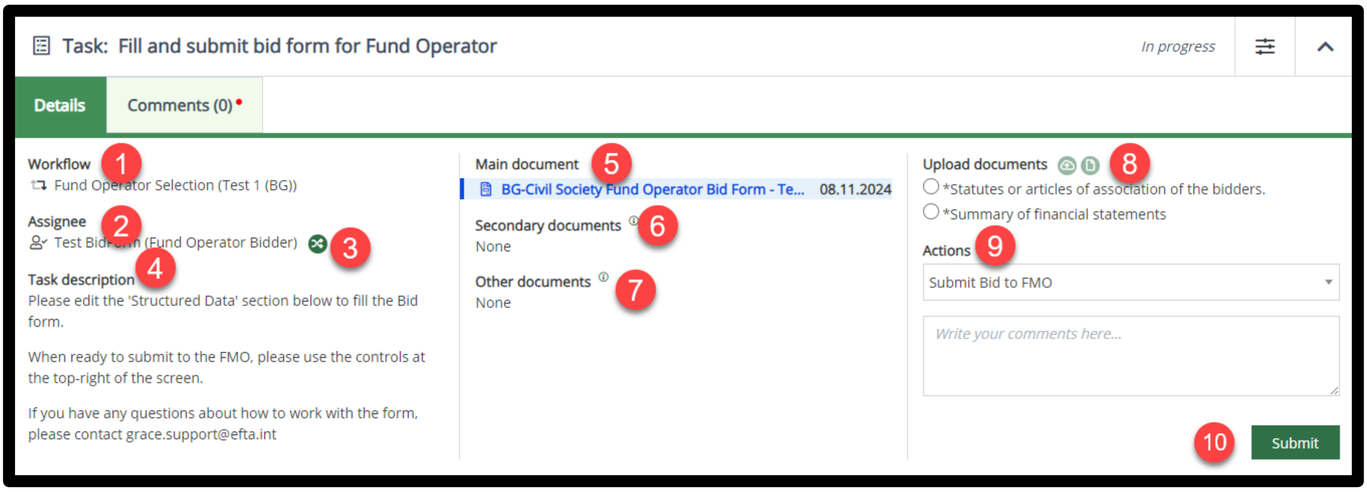
You can also take over a task from someone, or give it to someone else, when you are on the screen looking at the bid form by clicking on the green icon next to the Assignee name (3):

3.1. Understanding the bid form task screen

When opening the task, you will see essential information such as:

1. Workflow – Displays the workflow name that this task is part of.
2. Assignee – Shows the person assigned to complete the task.
3. Reassign – Allows the task to be reassigned to another person within the group.
4. Task Description – Provides a brief summary of the task's purpose.
5. Main Document – The primary document associated with this task.
6. Secondary Documents – Additional documents related to the main document.
7. Other Documents – Any other supporting documents for the task.
8. Upload Documents – In this section, upload the required documents: "Statutes or Articles of Association of the Bidders" and "Summary of Financial Statements."
9. Actions - Once the document is complete, select "Submit to FMO" from the dropdown menu and click the "Submit" button to finish the task.
10. Submitting the Bid Form.

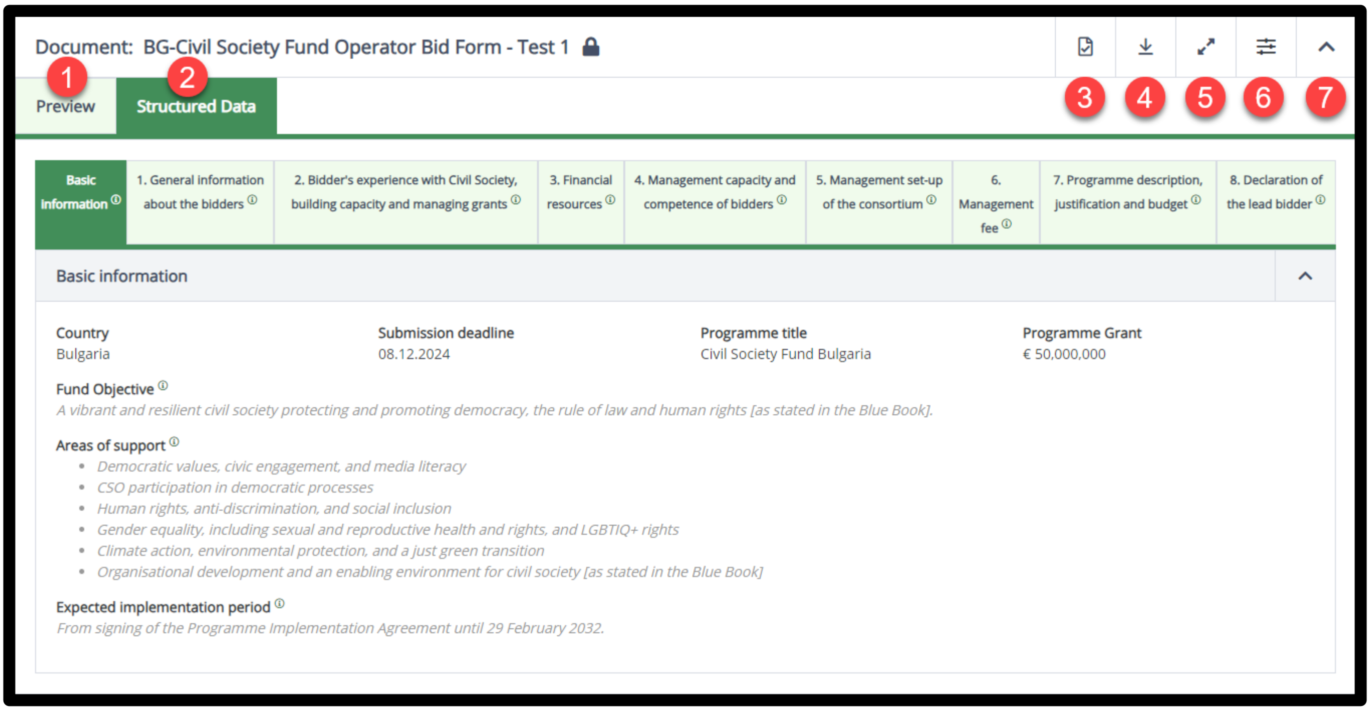
The Comments tab (next to the Details tab you are seeing first) serves as a communication hub for correspondence related to the status of your submitted bid form. In this section, both applicants and programme administrators can exchange messages, provide updates, request clarifications, and share important information regarding the review and evaluation process of the bid.



3.2. Navigating the bid form sections and tabs

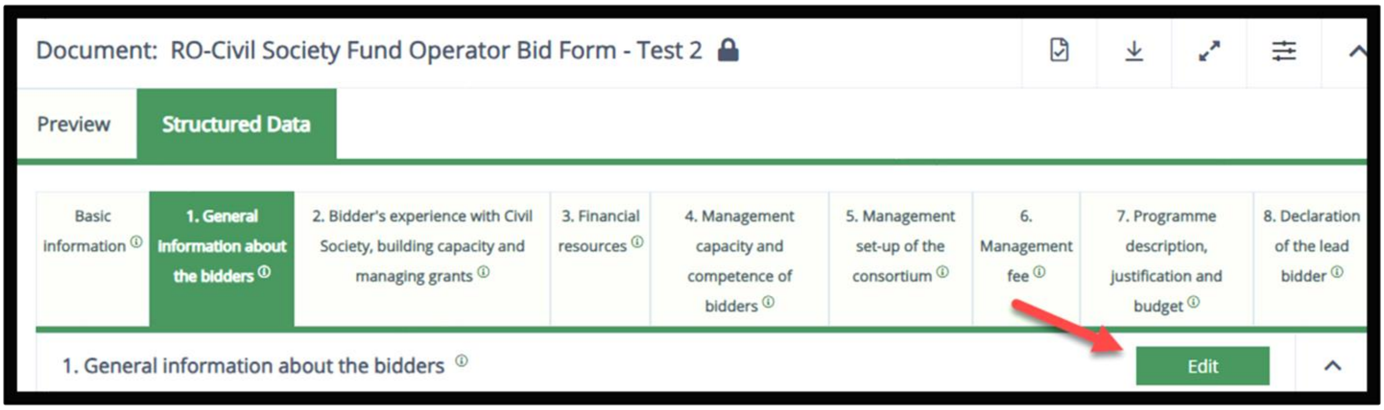
Below the details screen as explained above, you will find a Documents section where the various actions related to the document are available at the top (please see picture below):

1. Preview – Displays a preview of the document after data has been added to the structured data sub-tabs.
2. Structured Data Tab – Contains several sub-tabs where you can input required data.
3. Validate – Use this action to check for missing data or inconsistencies:
   - Red Message: This indicates critical issues. You may save the document, but you must resolve all inconsistencies and add missing data before the final submission.
   - Yellow Message: Indicates minor issues. You may save and submit the document, even with these inconsistencies.
   - Green Message: Indicates that the document is valid. You may save and submit without further action.
4. Export – Export the document as a PDF or MS Word file.
5. Toggle Full Screen – Opens the document in full screen for easier viewing and editing.
6. Document Details – Redirects you to a page displaying detailed information about the document, including the organisation, associated task, document version, related objects, and any linked documents. This page also includes a document preview and a structured data section. To return to the task, select “Active Task(s)” in the “Details” tab.
7. Expand/Collapse – Expand or collapse the document section to see more on the screen.



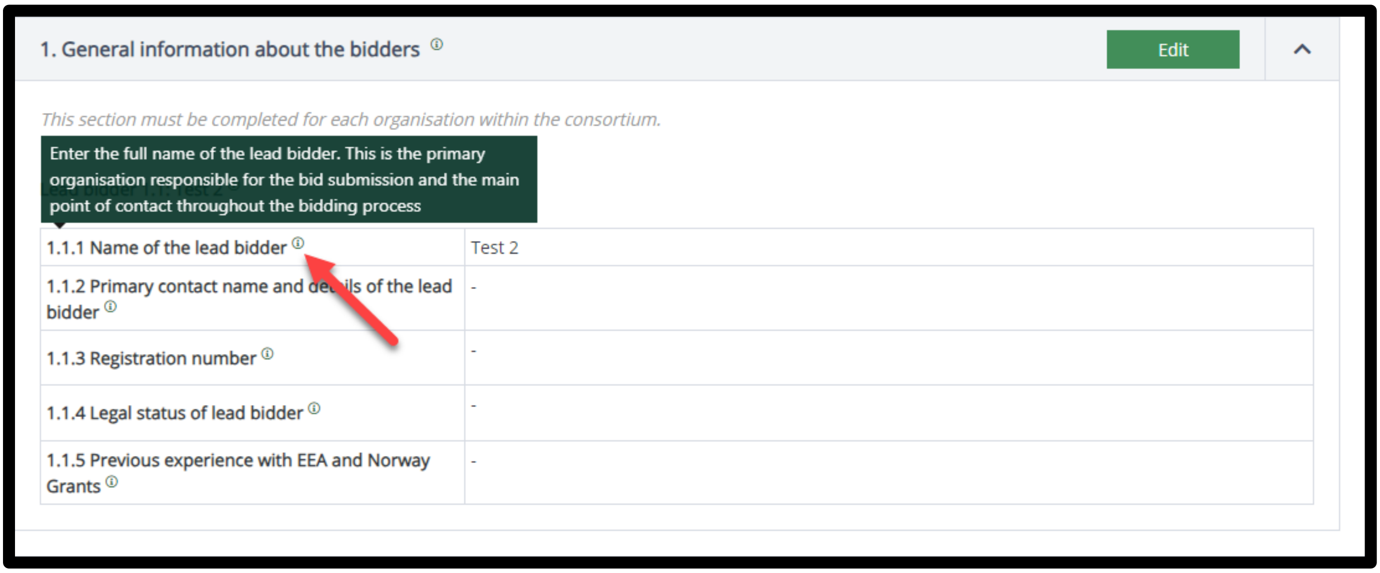
3.3. Filling in the Bid Form

In the "*Structure Data*" tab, you will find several new tabs with numbered headers. On each of the numbered tabs you will find an "**Edit**" button, allowing you to edit the fields. However, the first tab, the “*Basic information”* tab, is locked for editing as it contains pre-filled information provided by the FMO and cannot be modified.



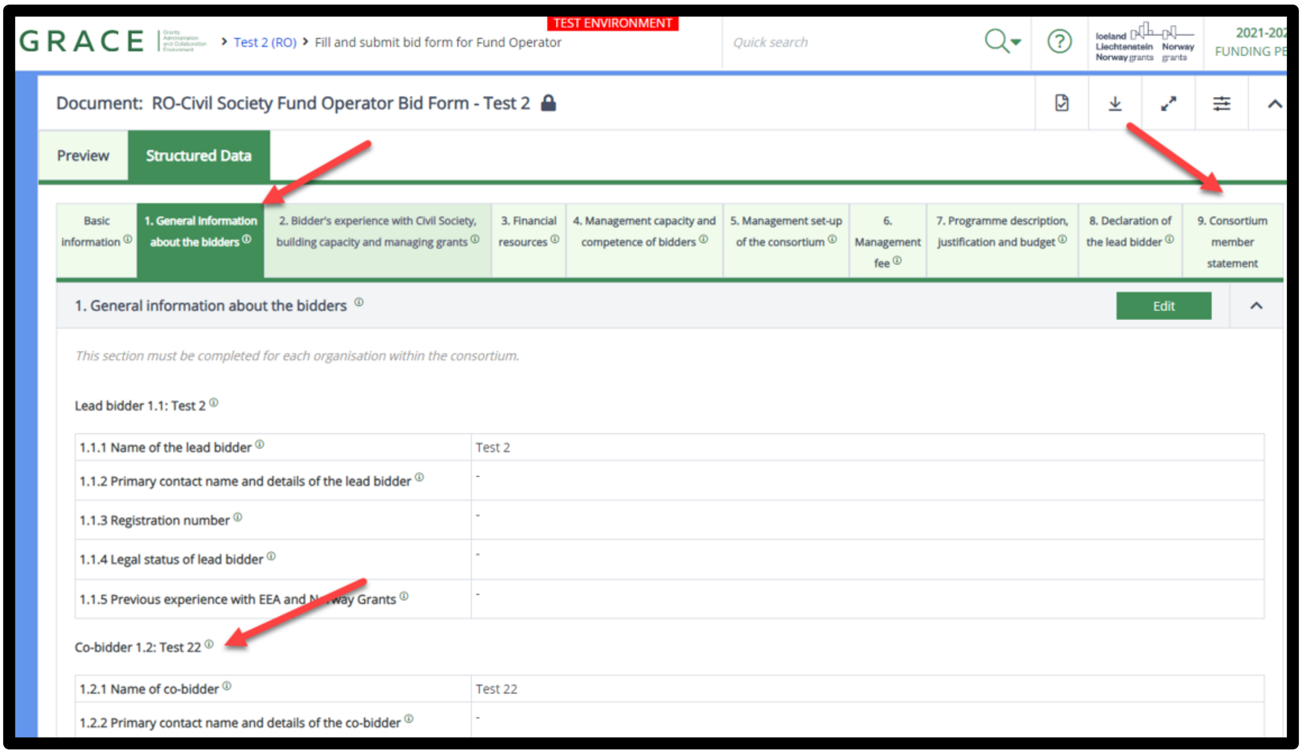
Some fields have small "**i**" icons to help you. When you hover over these icons with your mouse, a tooltip will appear, briefly describing the information required for that field.

3.3.1. Co-bidders

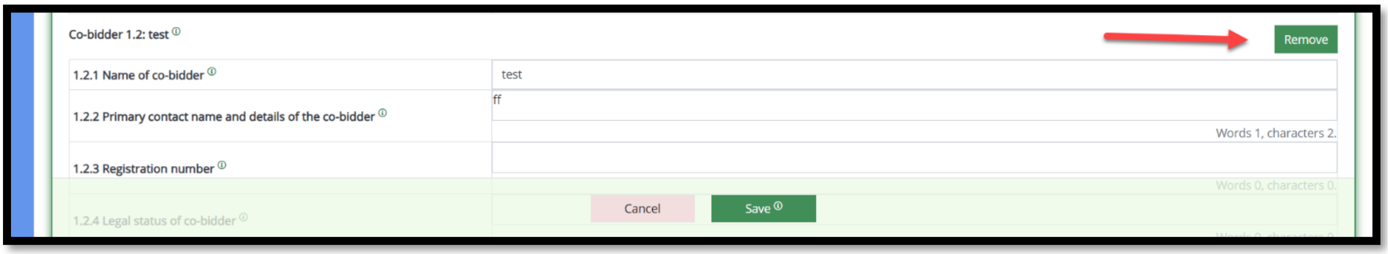


You can add co-bidders to the bid form in the tab *"1. General Information about Bidders".* Once a co-bidder is added, a new tab titled *"9. Consortium Member Statement*" will appear at the end of the tabs. In this new section, each co-bidder must upload their Consortium Member Statement document to complete the submission process.

Make sure that the co-bidder has the necessary documentation prepared for upload. This statement is essential for completing the co-bidder's profile in the bid form.

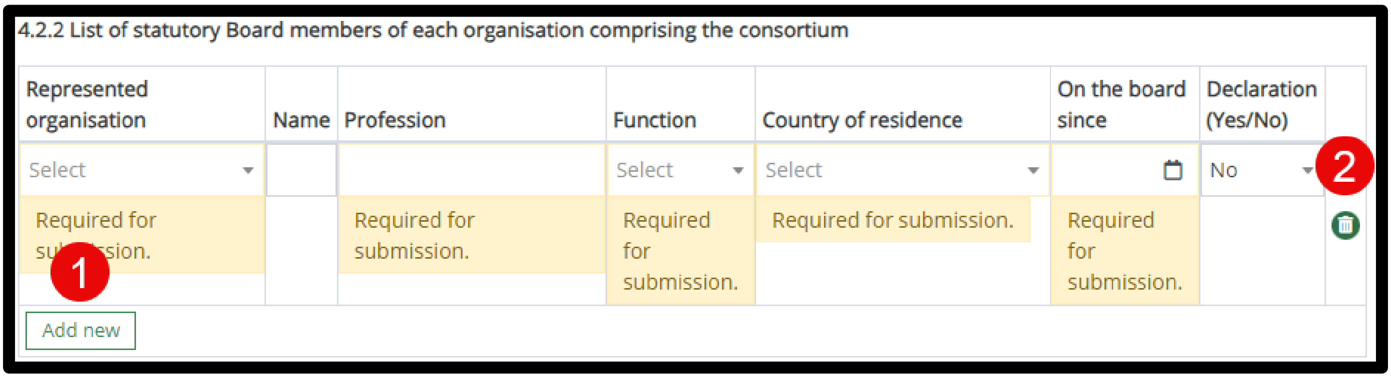


If you want to remove a co-bidder entry, you can click on the "**Remove**" button:



3.3.2. Tables

You may need to add rows to tables or sections to provide additional information in some sections. To add a new row, click the "**Add new**" button (1). If you need to remove a row, click the "**Remove**" button (2).



4.2.2 List of statutory Board members of each organisation comprising the consortium

Represented organisation	Name	Profession	Function	Country of residence	On the board since	Declaration (Yes/No)	
Select			Select	Select		No	2
Required for submission.		Required for submission.	Required for submission.	Required for submission.	Required for submission.		
1							

Add new

3.3.1. Uploading and managing documents

Documents for tabs 8 and 9

The tabs *"8. Declaration of the lead bidder"* and *"9. Consortium member statement"* require the Lead Bidder and Co-Bidder to upload specific documents as part of the submission process.

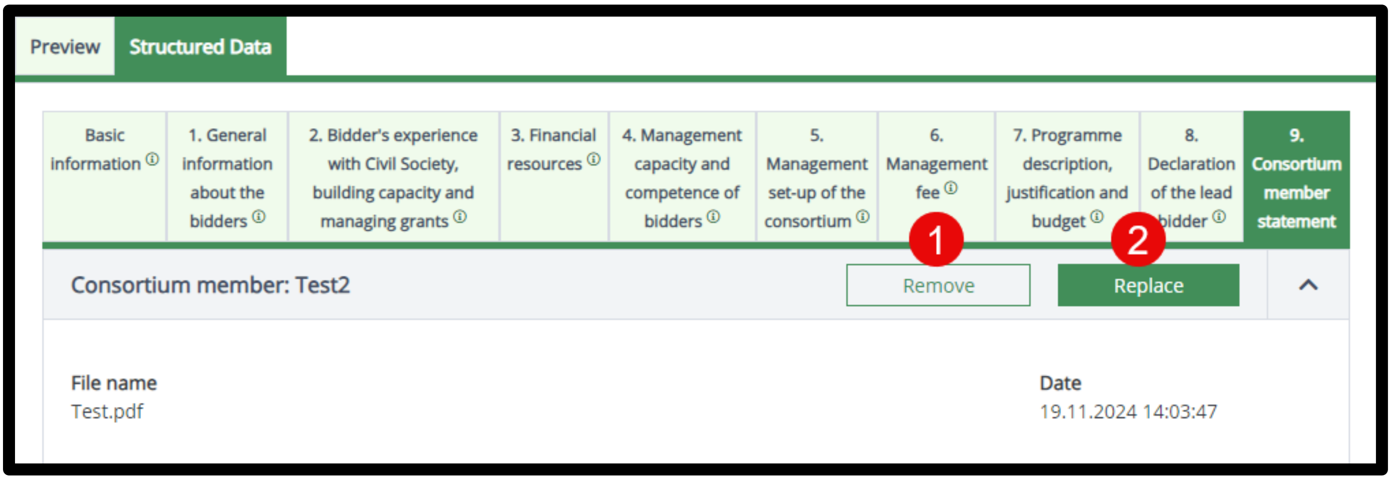
Click on the Upload One **file** button to select and upload the required document. Only PDF format is allowed. Document templates are available in the Bid portal for Fund Operators.

Once the document is successfully uploaded, the file name and upload timestamp will appear on the screen, indicating that the document is ready for submission.

Managing uploaded documents:

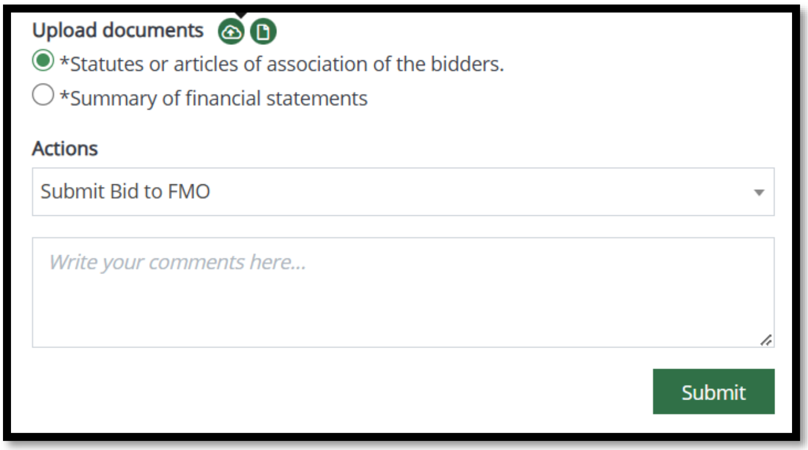
After uploading, you have two options to manage the document:

1. Remove - if you need to delete the uploaded document, click the Remove button (1). This will delete the file from the submission, allowing you to upload a different document if necessary.
2. Replace - if you need to update or replace the document with a new version, click the Replace button (2). This will prompt you to upload a new PDF file to replace the previously uploaded document.



Required Secondary documents

At the top right, above the submit section, you will see there are 2 documents required before you can submit. They have a * (star/asterisk) next to them to indicate they are mandatory.

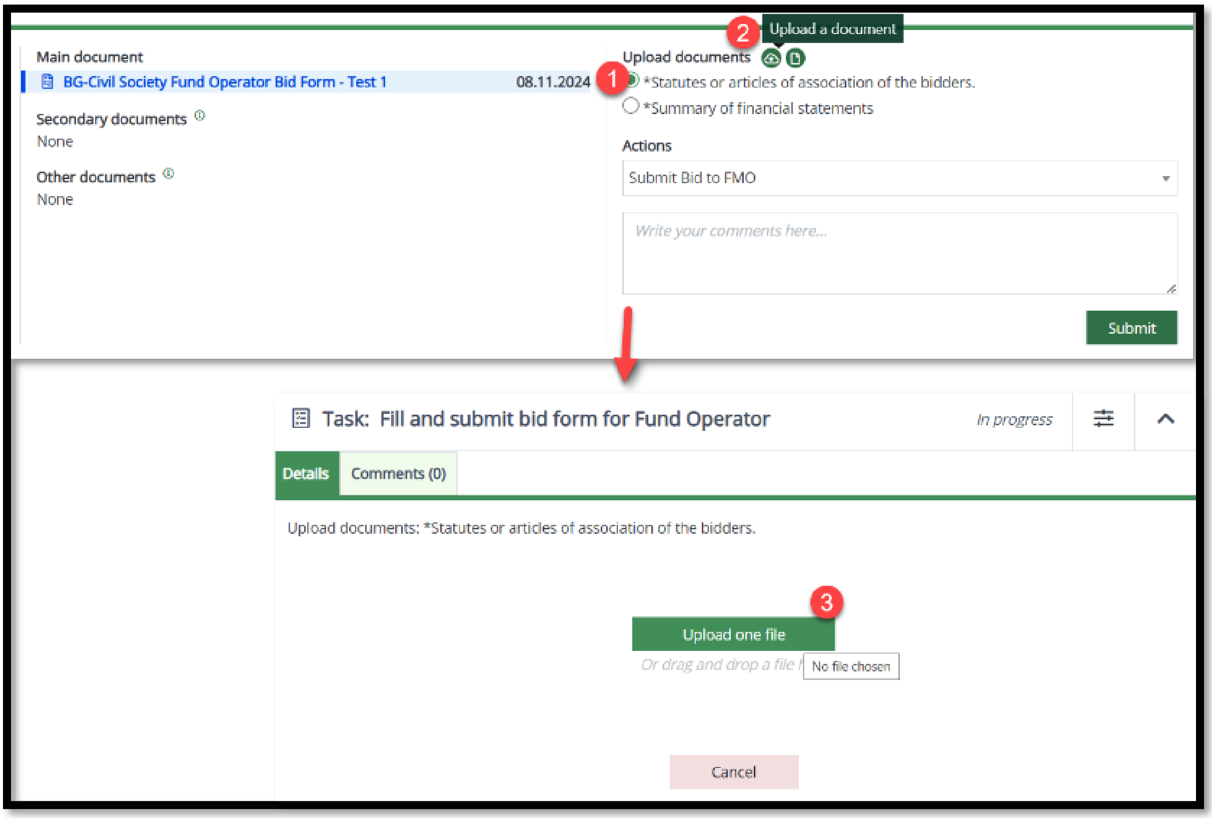


- **Statutes or articles of association of the bidders.**
  - An English translation of each bidder's statute is required (no need for certified translation).
- **Summary of financial statements**
  - A summary of financial statements covering the previous three years including balance sheets, profit and loss accounts, income statements/statement of activities (detailing the organisation's incomes and expenditures). At least the most recent year's financial statements must have been audited.

You can either upload these documents as files, or create a document directly in GrACE and edit it there:

Option 1: Upload an existing file

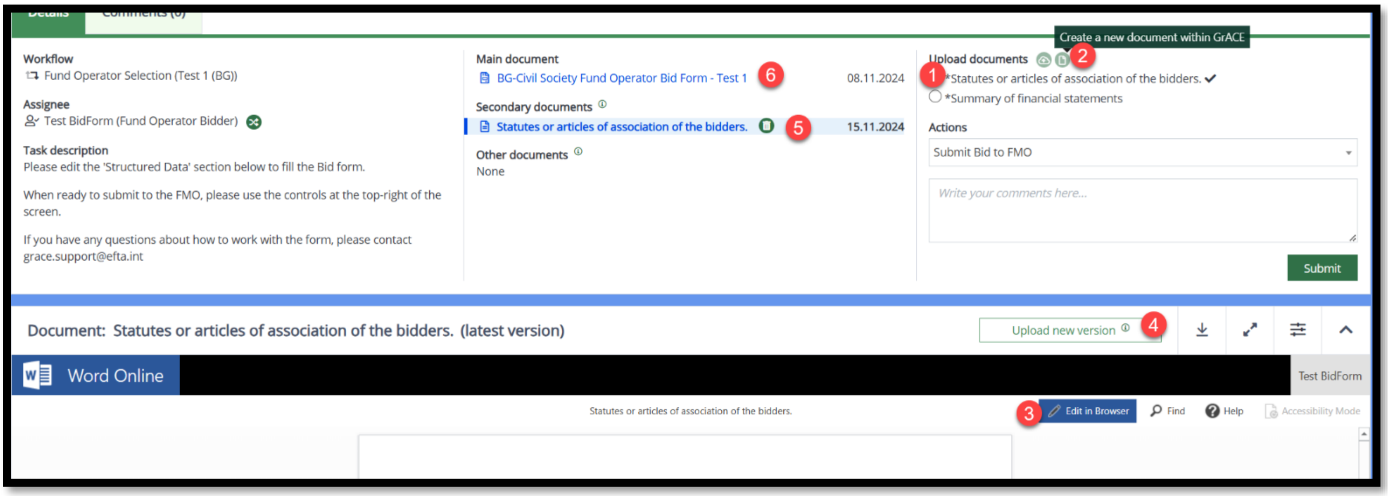
1. To upload a file, click in front of the document name where you would like to upload a file.
2. Click on the small green icon of a cloud with an arrow inside of it.
3. You will get a new screen asking you to either drag and drop the file into the box or click on the button "Upload one file" to browse through your computer.



When uploaded, you will return to the main task screen and you will see your document under “Secondary documents” in the top middle section, please see (5) in the next screenshot. You can also delete the document if needed, see (5). To see the bid form sections once more, click on the Main document (6).

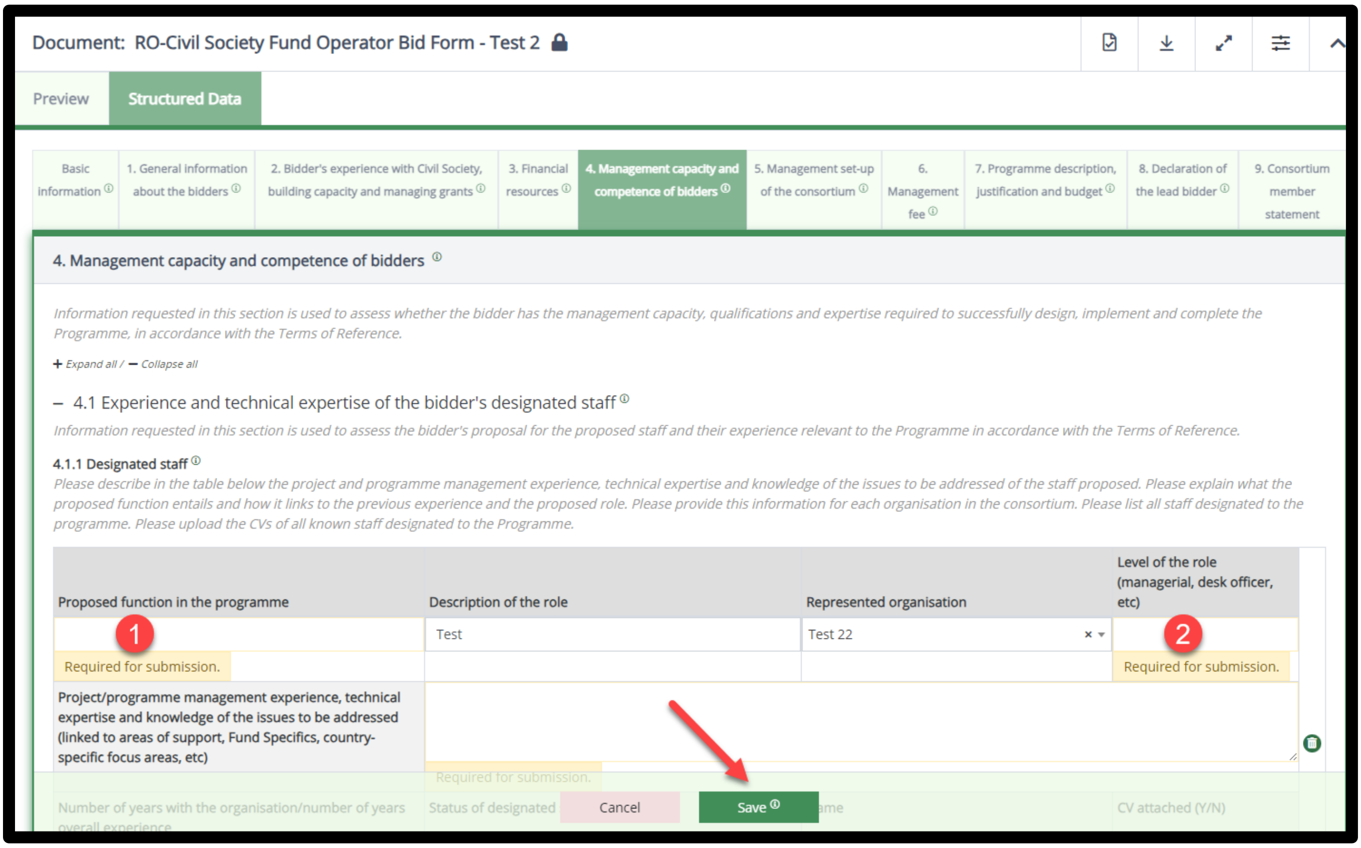
Option 2: Create a new document inside GrACE

1. Click in front of the name of the document you want to create.
2. Click on the small green icon, number 2 from the left, depicting a small document.
3. You will see a new Word document in front of you, and you can click on “**Edit in Browser**” to amend.
4. You can also upload a Word document here by clicking on this button.
5. You will find the document listed as a Secondary document here. Should you need to remove it, you can click on the small green symbol of a waste bin.
6. To see the bid form sections once more, click on the Main document.



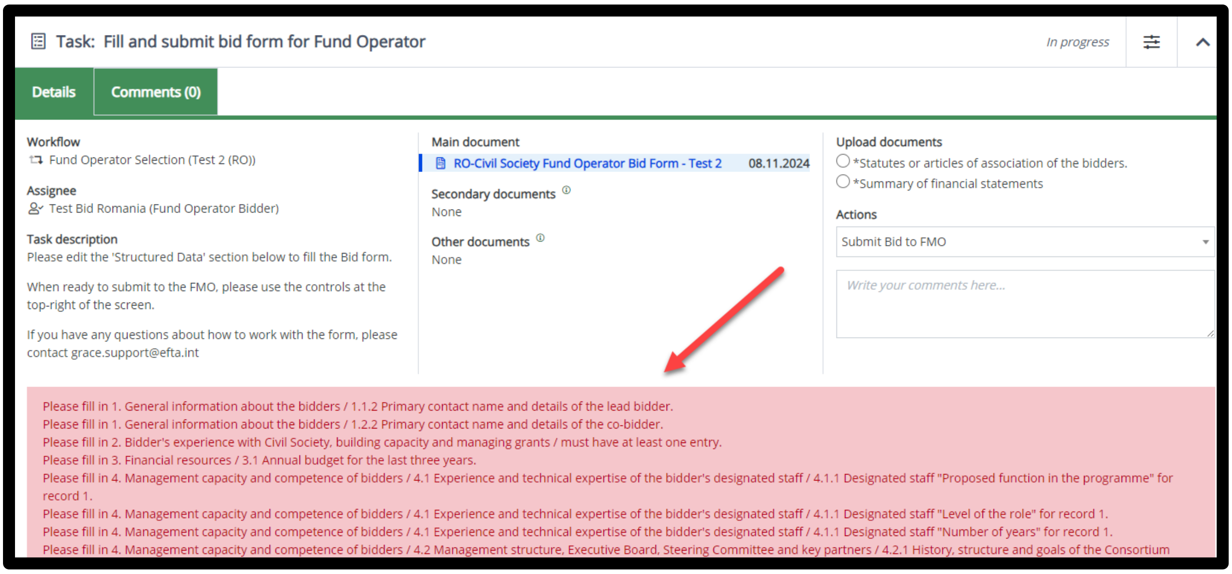
3.3.2. Mandatory Fields and Data Validation

Certain fields are marked as *Required for submission* (see examples 1 and 2 in the picture below) to ensure a complete and valid form. While you can save the form with some required fields left blank, submitting the form requires all mandatory fields to be filled in, so you will not be able to submit the form until they are. These yellow warnings are for information and it will allow you to save and store your data, but you will not be able to submit and send the form without filling them in.



When you attempt to submit, the system will check all required fields across the different tabs and sections. If any field marked as *Required for submission* are left blank, the submission will not go through, and red error messages will appear, listing the fields that still need to be completed – please see pictures below.

To successfully submit the form, review all the section headers, complete any fields marked *Required for submission* and resolve any warnings and errors that appear.

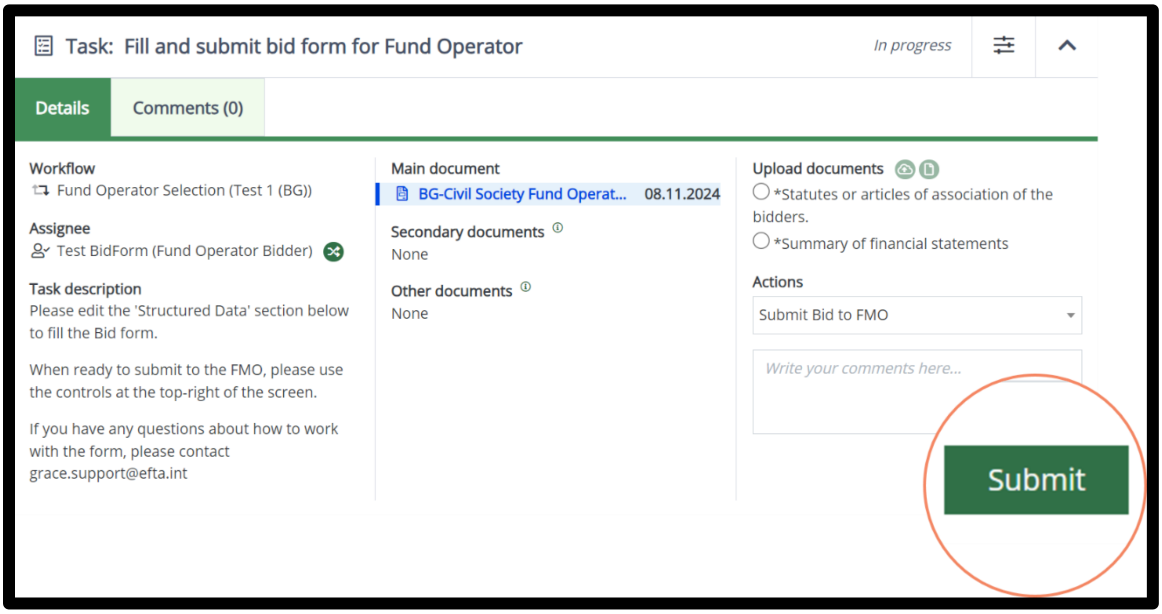


4. Submit the Bid Form

The final step in the process is to **Submit** the Bid Form. To ensure submission is possible, verify the following:

- Make sure all fields are filled in correctly.
- Confirm that all required additional documents have been uploaded successfully.

Once these prerequisites are met, click the "**Submit**" button to complete the process. The Bid Form will be submitted to the FMO.



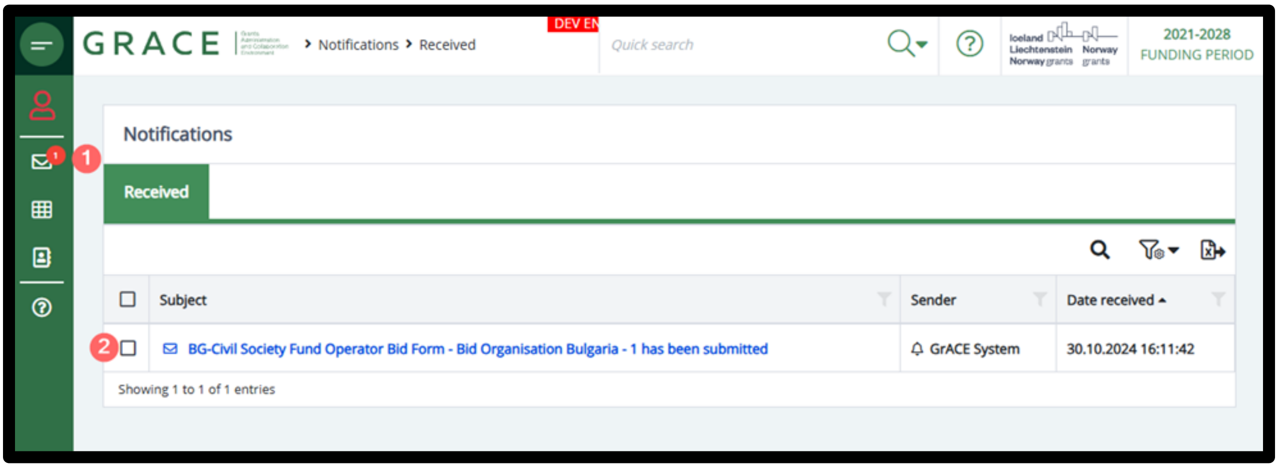
4.1. Confirmation of submitted form

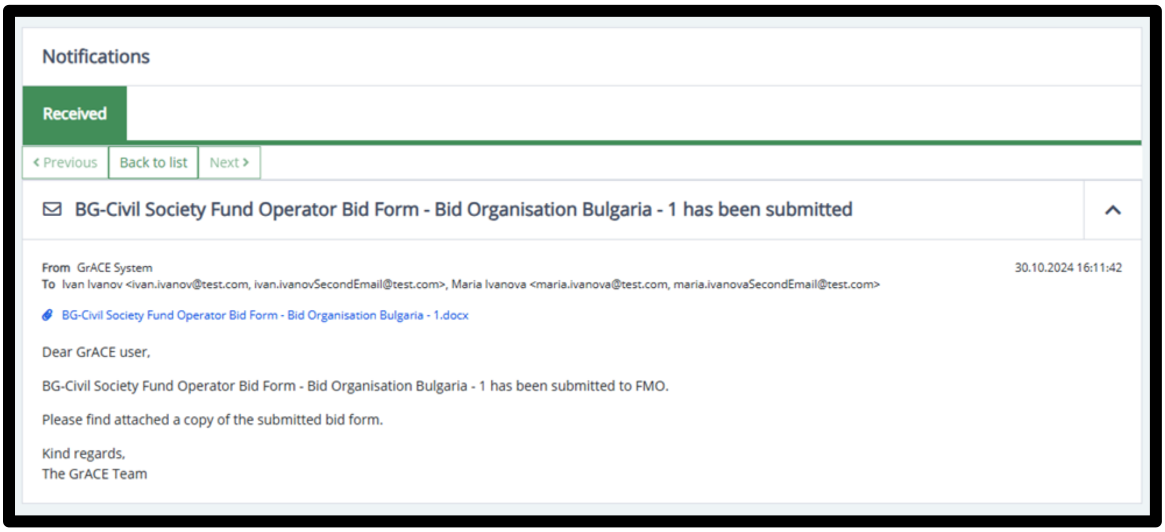
After submission, you will receive a notification both in the Grace platform and via email.

To access the notification in Grace:

- Open the Notifications Menu (1).
- Locate and select the specific notification (2) related to the Bid Form submission.

This ensures you are informed of the successful Bid Form submission and any further steps required.





5. Update the Bid Form

The Lead Bidder may receive the "Provide Additional Information" task after submitting the form.

If the FMO requires additional information, the Fund Operator will be assigned a new task: "Provide Additional Information."

In this task, you will have the opportunity to:

- Edit and update the Bid Form based on the reviewers' feedback.
- Once revisions are complete, resubmit the form for review by clicking the **Submit** button as previously explained in this user manual.

6. Access the submitted Bid Form

As seen in section *4.1 **Confirmation of submitted form***, a copy of the Bid Form has been sent by email and message inside of GrACE. At any time, the user who submitted the form can login to GrACE and access these messages and download the Word document should they need to.