UNHCR Programme and Partnership reforms:
key changes for partners

What is changing for partners?

NEW AGREEMENTS FROM 2024:
Introduction of Partnership Framework Agreements for all partners (except UN, grant agreements) will allow for more predictability in partnerships

NEW PROCEDURES AND GUIDANCE :
New UNHCR Procedures on Partnership Management consolidates/supersedes all previous instructions / guidance for management of funded partnerships

Forthcoming Partner Handbook and new partner learning platform
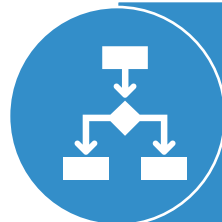
NEW SYSTEMS: PROMS, Cloud ERP, COMPASS working together
Partners will use PROMS directly. Simple online procedures
Documents stored safely and accessed easily for oversight
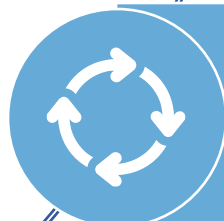
EFFORTS TO FURTHER HARMONIZE WITH OTHER UN AGENCIES:
Using UN standardized risk rating/ICQ of other UN audits to reduce requirements
New PSEA module on UN Partner Portal allows for mutual recognition and info-sharing

For more details, see the
2023 Guidance for
Partners on the United
Nations Partner Portal

Main changes in new UNHCR partner management procedures - 1

Until now…	In future…
Partnership Agreements	
• Two-year multi-year agreement format **with annual renegotiation.** • Partnership agreements included various appendices, including Annexes A (project description), B (a PDF budget) and C (data protection). • **Grant agreements** had a fixed ceiling of USD 4,000, with a maximum accumulate annual total of USD 12,000 per partner.	• **Partnership framework and data protection agreements** focus on long-term outcomes, consisting of terms and conditions. • Annual **project workplans** include **financial and results plans**, and a **risk register** and incorporate control measures. • **Grant Agreements** are capped at USD 12,000 per agreement. Multiple grants to the same partner are possible for a cumulative total of USD 12,000 per year.
Internal Control Assessment (ICA) and Project Audit Internal Control Questionnaire (ICQ)	
• UN agencies used different formats for **project audit ICQs**, leading to duplication for partners. • UNHCR also used different formats for the ICQ and **ICA.**	• No need to conduct an ICA/ICQ when UN equivalent exists within a three-year validity period. • **UNHCR Project control** conducts ICA **every three years** when partner does not have a UN risk rating.
Partner's Procurement Capacity	
• UNHCR SMS/HQ conducted a **pre-qualification for procurement** (PQP) process when partners procured over $100k. • Operations conducted **procurement capacity assessments** for all partners annually.	• PQP and annual procurement capacity assessment are **no longer required.** • UNHCR operations determine the level and type of procurement by partners based on the **procurement risk rating under the ICA/ICQ.**

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Main changes in new UNHCR partner management procedures - 2

Until now..	In future..

Budgeting

Until now..	In future..
• The budget negotiation process involved an Excel template. Annex B was a PDF. • The PFR was generated by UNHCR and shared with the partner upon request via email.	• The **financial plan is available in PROMS** for negotiation and finalization (15x account codes). • A **project financial report** is automatically generated in PROMS and available for partners via the workflow (same 15x account codes).

Project Monitoring Plan

Until now..	In future..
• Operations and partners agreed on a **project performance monitoring** plan (PMC01) for each partnership agreement. • This plan was an offline Excel format.	• **The PMC01 is no longer required.** • Instead, there is **1x annual assessment, monitoring and evaluation workplan** per operation. • A new **risk register** also replaces the project monitoring plan template, to jointly develop with partners surrounding project activities.

Goods and Property

Until now..	In future..
• Separate right of use agreement for UNHCR assets on loan to the partner. • Partners reported on all assets twice yearly via their **goods and property offline report.** • Physical verification was required twice a year on all the above assets.	• **Right of use clauses** come under the areas of specialisation and maintained on the UNPP. • **No goods and property report is required.** • Assets purchased by a partner with UNHCR funding are owned and controlled by the partner. • **Partners asset management** is assessed during the ICA/ICQ. • Annual physical verification required for assets on loan from UNHCR.

Partner Reporting

Until now..	In future..
• Partner reporting required a **minimum of 3x times per year** covering results, expenditure, personnel, goods and property. • Set deadlines applied globally to all partners to submit their reports.	• Partner PFR still required **a minimum of 3x times per year.** Progress/results reporting is agreed locally. • Partners are required to share a **year-end results report** (latest by 31 January) and narratives/ financial report (latest by 15 February).

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PROMS OVERVIEW

What is PROMS?

UNHCR will use Oracle Aconex as a **front-end system and a tool** to simplify existing processes and provide an end-to-end solution to establish, manage and close projects.

It will **integrate with other UNHCR systems** in order to ensure that information is captured once and that partner collaboration activities are more effective and efficient.
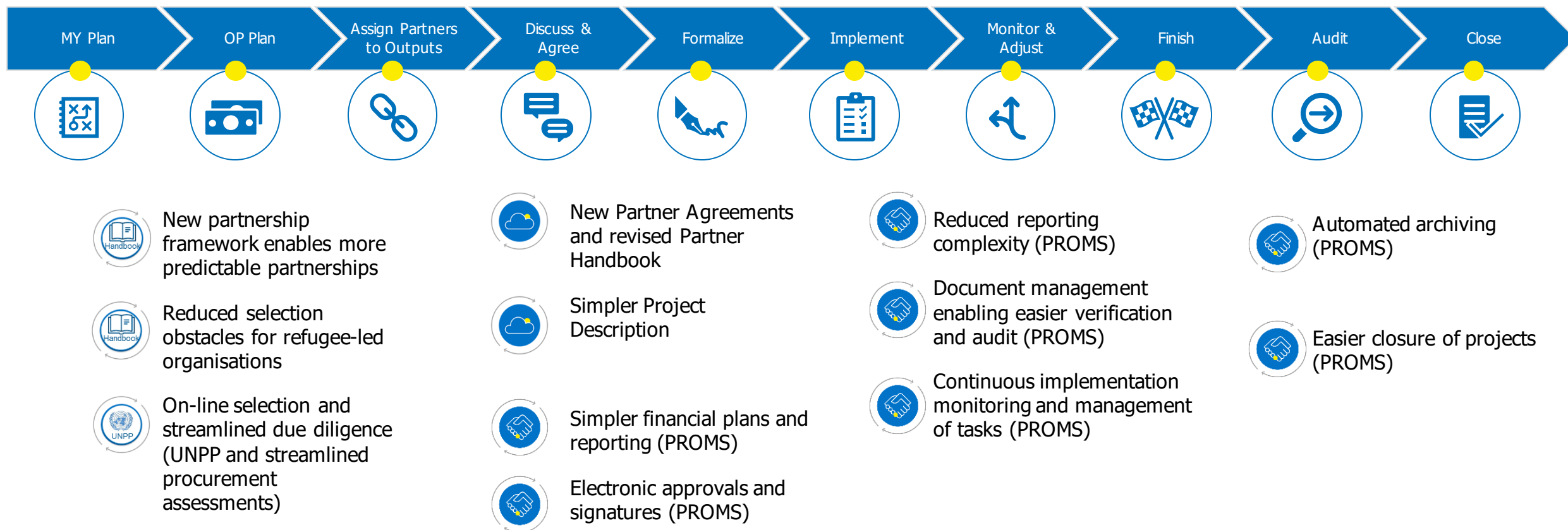
In the process, UNHCR will have the ability to **integrate risk management** as part of the design process of projects. This is to be achieved through the streamlining of processes, differentiation of controls according to risk levels, and by employing digitization and automation where appropriate.
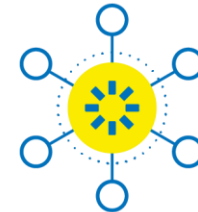
PROMS will ensure that the focus of the **daily activities** of partners, programme and project control colleagues is on the delivery of protection and assistance.
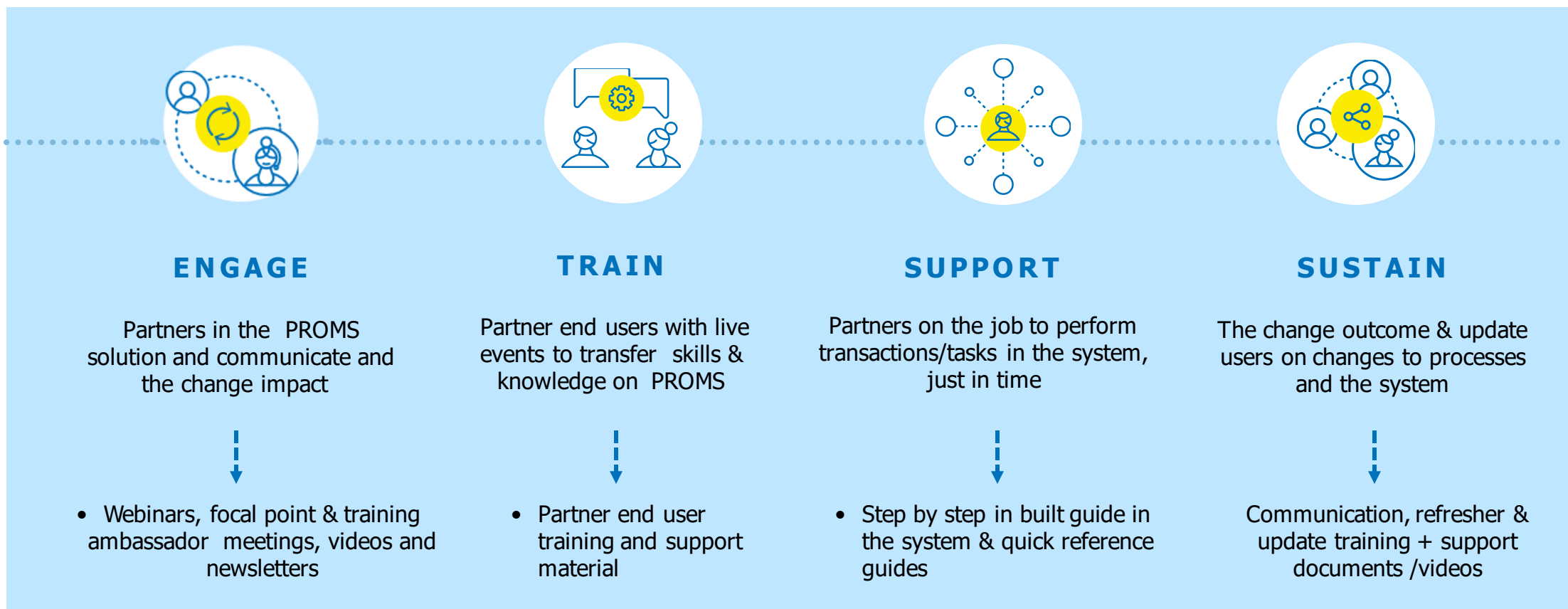
How will we accelerate partnership reforms?

MY Plan	OP Plan	Assign Partners to Outputs	Discuss & Agree	Formalize	Implement	Monitor & Adjust	Finish	Audit	Close

New partnership framework enables more predictable partnerships

Reduced selection obstacles for refugee-led organisations

On-line selection and streamlined due diligence (UNPP and streamlined procurement assessments)

New Partner Agreements and revised Partner Handbook

Simpler Project Description

Simpler financial plans and reporting (PROMS)

Electronic approvals and signatures (PROMS)

Reduced reporting complexity (PROMS)

Document management enabling easier verification and audit (PROMS)

Continuous implementation monitoring and management of tasks (PROMS)

Automated archiving (PROMS)

Easier closure of projects (PROMS)

UNHCR The UN Refugee Agency | PROMS
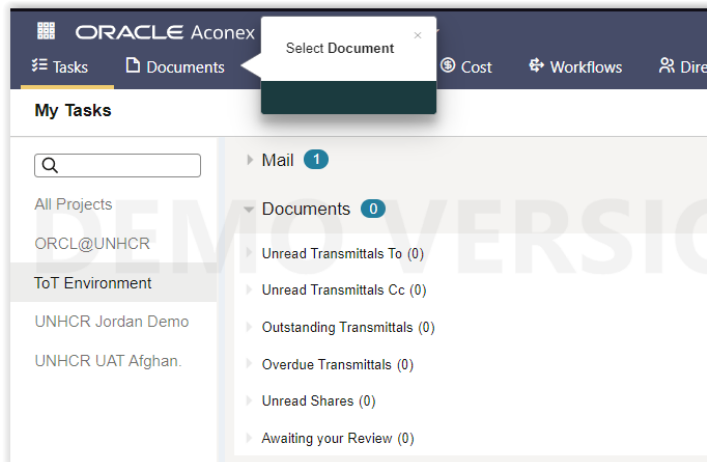
TRAINING APPROACH

PROMS TRAINING & CHANGE MANAGEMENT APPROACH

PROMS will onboard all actors and train users before Go-Live, then support them at the time of need, keeping users up-to-date & involved in the long term
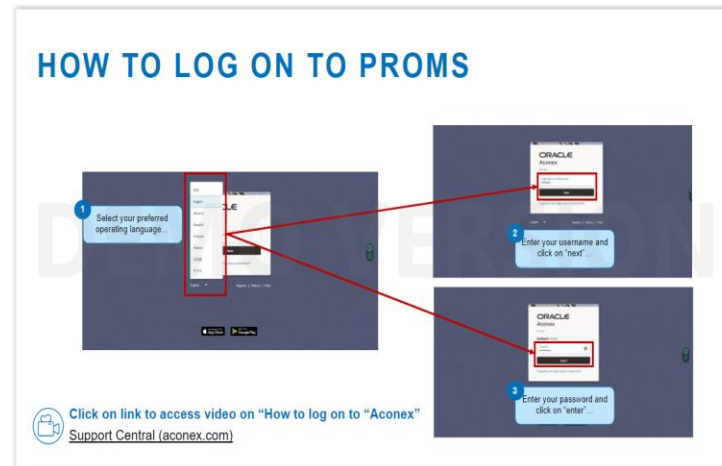
ENGAGE

Partners in the PROMS solution and communicate and the change impact

- Webinars, focal point & training ambassador meetings, videos and newsletters

TRAIN

Partner end users with live events to transfer skills & knowledge on PROMS

- Partner end user training and support material

SUPPORT

Partners on the job to perform transactions/tasks in the system, just in time

- Step by step in built guide in the system & quick reference guides

SUSTAIN

The change outcome & update users on changes to processes and the system

Communication, refresher & update training + support documents /videos

Training Product examples
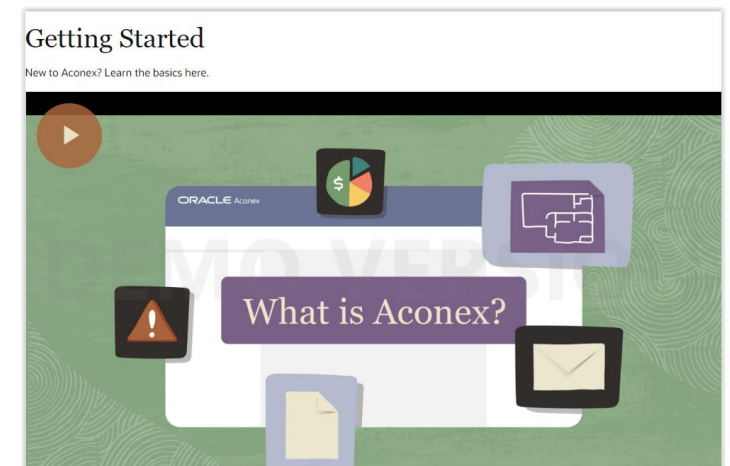
OGL (Oracle Guided Learning) sample guide
<Link>

Feature Navigation Slides
<Link>

Standard Oracle System training
<Link>

HOW WILL WE TRAIN?

Training before go-live	On-the-job and post go-live

LIVE EVENTS

Either face to face or online led by country and bureaux trainers:

- Learn about the PROMS solution and policy changes
- Understand your role in PROMS
- See demos on how to complete a process in PROMS system

ACONEX EXPLORE

Oracle standard support centre:

- Introductory Cloud SaaS Training
- 24/7 digital learning experience (videos and user guides)
- All standard system features and admin training

OGL GUIDED LEARNING

Step-by-step process guides built into Aconex :

- Interactive walk through of Key PROMS processes
- PDF and Video of step by step in printable or digital versions.

SELF-HELP SERVICE

Training Material stored on a central server that is accessible to end users:

- Oracle Guided Learning
- Live training session recordings
- Online training content in centralised platform
- Video demos of key templates

How will we support you?

Issue resolution

Self-help resources, local regional support and dedicated e-mail. (see next slide)

Training kit

Up-to-date guidance materials stored in a centralized platform.

Video Recordings

Recorded topics by BPOs/SMEs to support trainees who are unable to attend training/for knowledge refreshers.

Job Aids & FAQs

Job aids per process

Levels of support for partner users

PROMS user (partner personnel)

Consult self-help learning resources (e.g., Partnership Handbook, UNPP)

ACONEX organization administrator (partner personnel)

If issue persists

Contact ACONEX Organization Administrator for support

PROMShelp@unhcr.org

If issue persists

Send e-mail to PROMShelp@unhcr.org, describing the issue

PROMShelp@unhcr.org triggers creation of ServiceNow ticket

DSPR Implementation Management and Assurance Service (IMAS)

Review and respond to ServiceNow ticket

DIST / Oracle / BOARD / Accenture

If issue persists

Escalate to technical team for bug fix/workaround

Your PROMS path
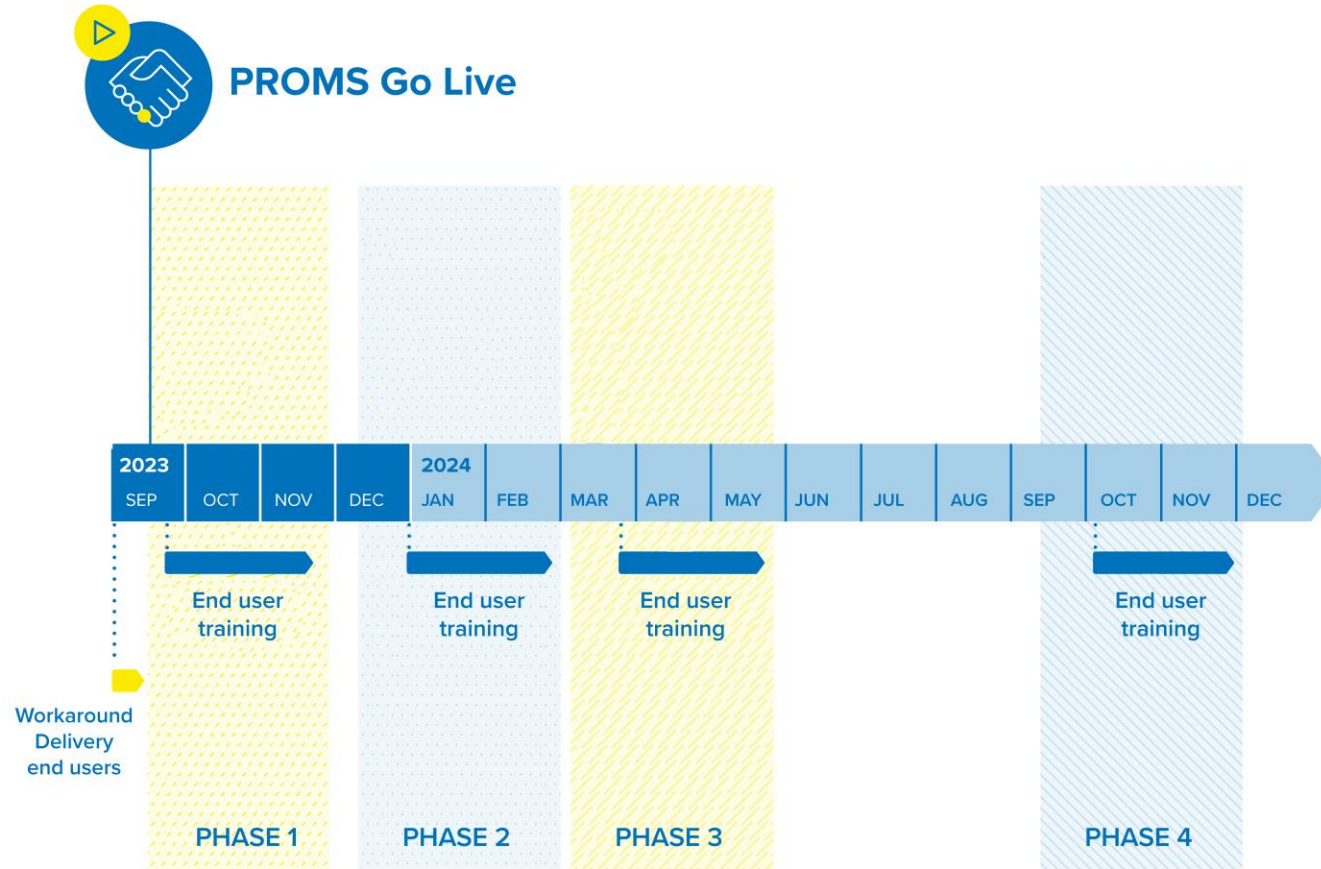
Phase 1: Planning/setting-up 2024

Phase 2: PFR and verification
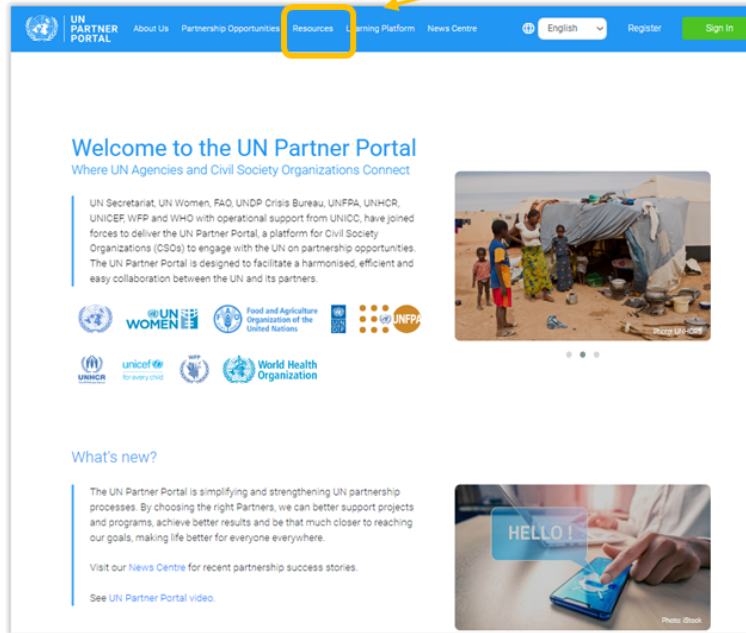
Phase 3: Monitoring/amendments

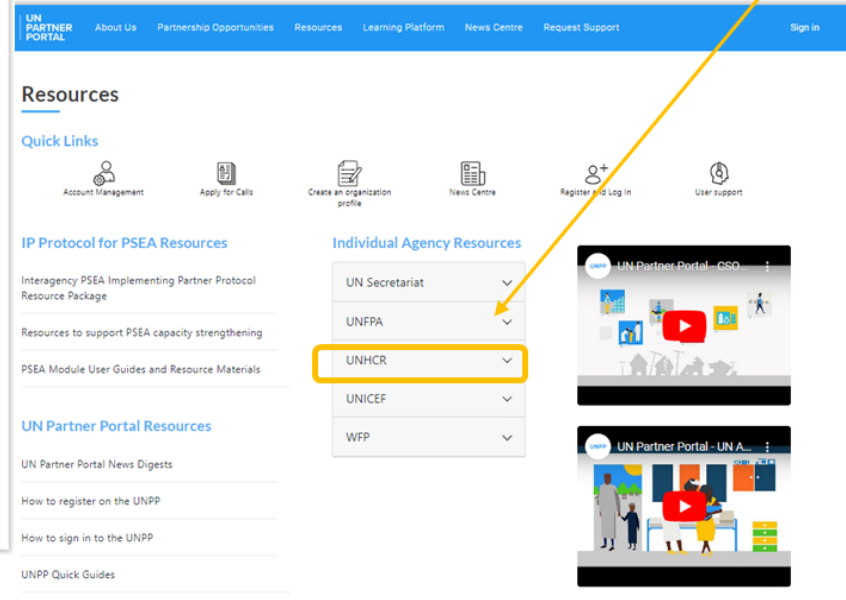**Phase 4:** Closure and audit

Change management support: regional drop-in sessions, training kits, learning content on a centralized hub.
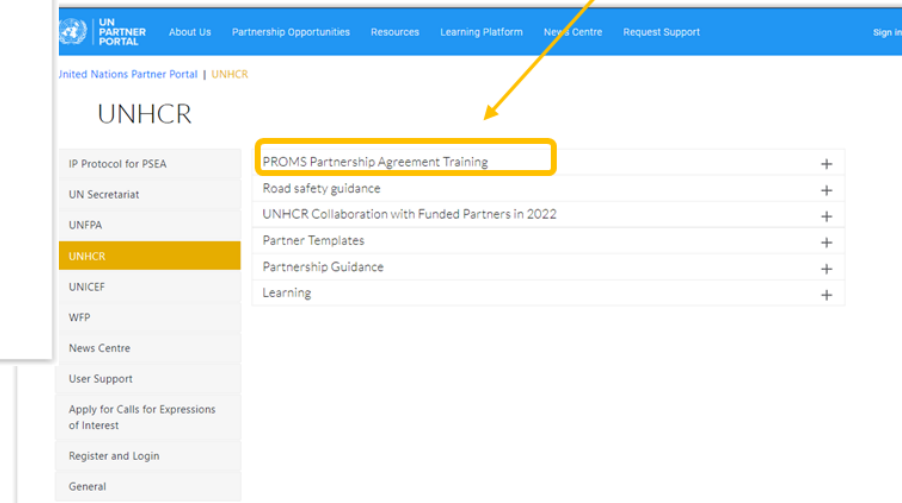
How will Partners access training?

UNPP Home page – select '**Resources**'

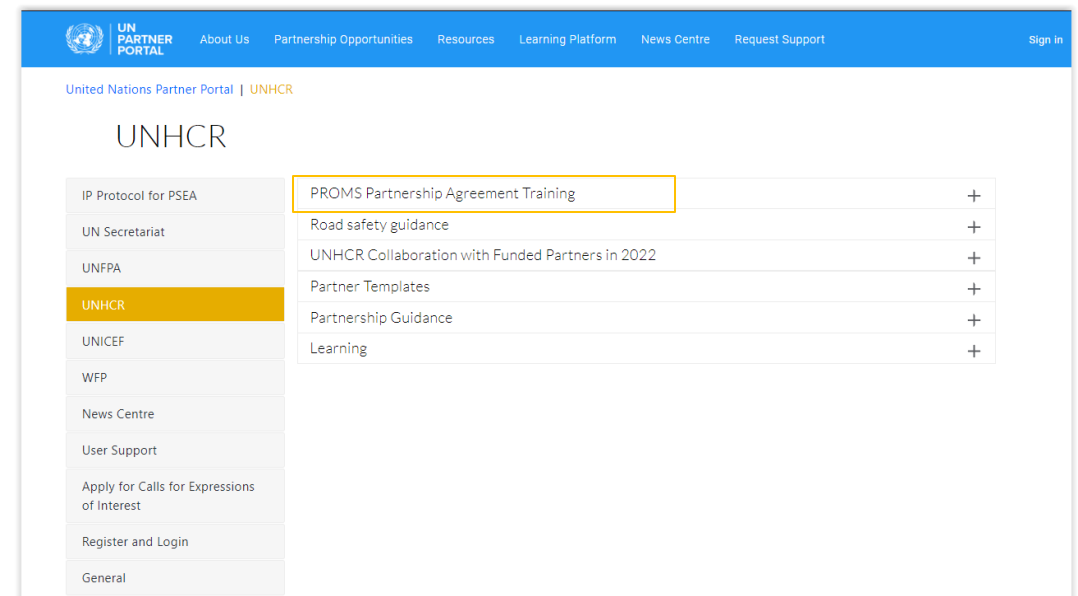Resources – select '**UNHCR**'

UNHCR – select '**PROMS Partnership Agreement Training**'

Coming soon!

How will we train the partners?

- All content will be centralised on a **learning platform** (coming soon)

- **Access:** either self-registration or open access

- **Training kit:**
  – Glossary of terms
  – Translation from English, Spanish and French in time for end-user training
  – Training path from phase 1 to phase 4
  – Guide for where to find content
  – Training plan
  – Support system

THANK YOU