Erasmus+

Implementation of ERASMUS+ Capacity Building Projects: Management, Coordination, Budget and Financial Reporting

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CONGRATULATIONS

YOUR CBHE PROJECT

Your proposal — **10%**

Your project environment — **90%**

Different
- Individuals (/personalities)
- Countries (/cultures, currencies, languages, time zones)
- Legal **requirements**
- Institutional **constraints**

Outline

1. **Project Management**
2. **Changes to the Agreement**
3. **Monitoring**
4. **Budget : basic principles**
5. **Budget : reporting rules**
6. **Reporting**
7. **Dissemination and visibility**

Project Management
Your Grant Application

- Is the basis of your **partnership cooperation**

- Forms **part of your Grant Agreement** (Annex I)

- Its implementation has to be **compliant with the three levels** of external rules / regulations

2. Regulatory Framework
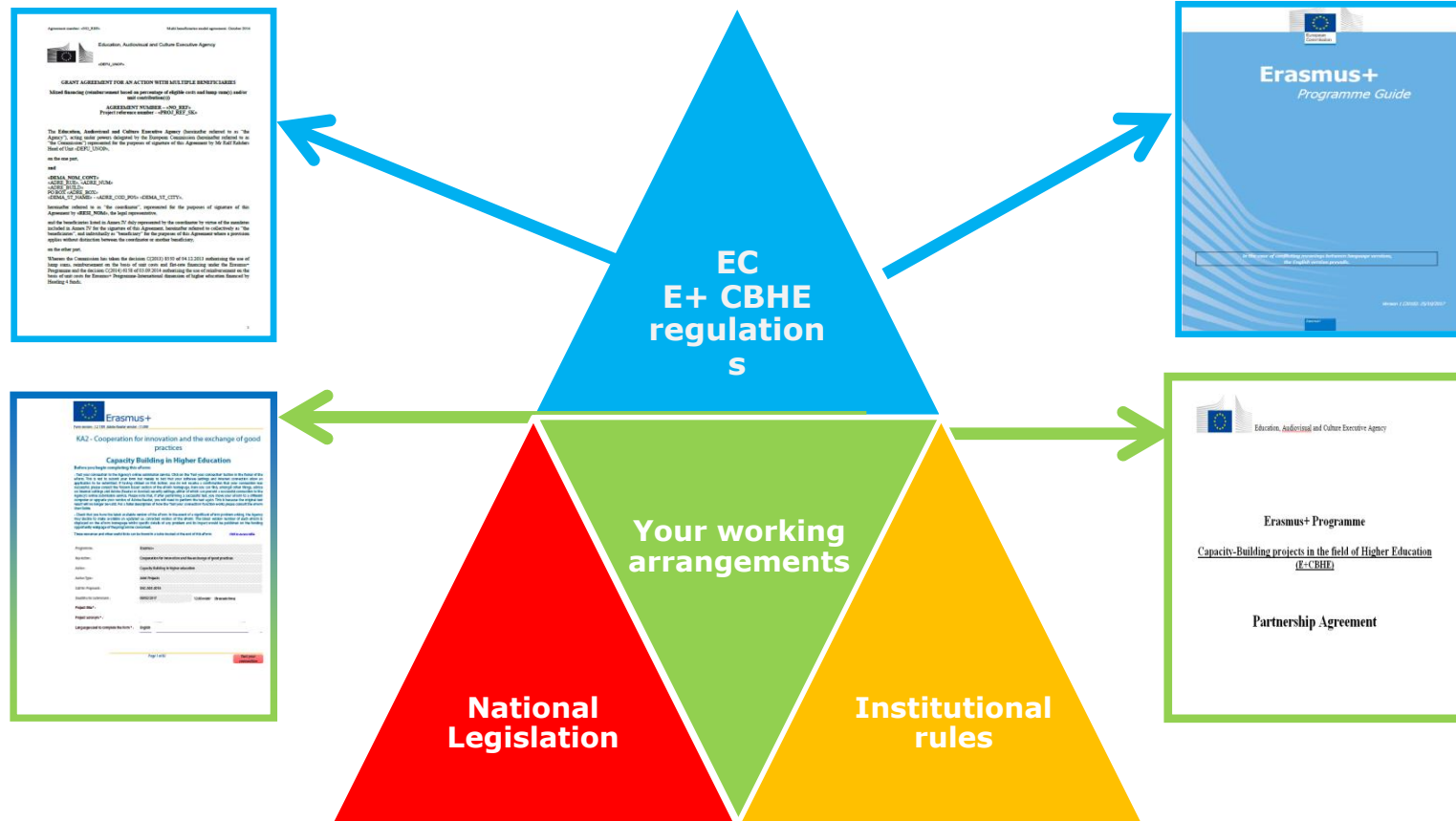
Changes to the Agreement

Administrative changes

  ➢ Address, Legal name, Legal representative, Bank Account, etc.

Operational changes

  ➢ Work programme, equipment, eligibility period
  ➢ Partnership (withdrawal, addition, replacement)
  ➢ Budget: 10% rule

How to proceed

  ➢ Inform coordinator asap, who will in turn inform the Agency
  ➢ The Agency will ask for supporting documents
  ➢ If the change is accepted: an amendment will be carried out if needed
  ➢ At the latest 1 month before the project's end date

Eligibility of activities

Beware!

Do not assume that all the activities in your project application are automatically eligible.

Before taking any action, **please verify first** that there are no doubts of eligiblity on the specific activity

Project Management
Clarify the roles and know the rules

Coordinator

- **Oversees the implementation** of activities
- **Manages the funds** and ensures the **respect of CBHE rules**
- **Central communication point** with project partners and external stakeholders
- In **regular contact** with the EACEA (through the project officer)
- Submits **interim and final reports and requests for payment** to EACEA

Partners

- **Implement activities** under their responsibility
- **Support the coordinator** (e.g. providing information and supporting documents for reporting on time!)
- **Work in full transparency** with the coordinator (inform of any changes / delays)
- **Contribute to the dissemination** of the project results in their organisation, community and/or region

Project Management
Partner Country Partners

Are **responsible for:**

Enhancing Project results **relevance** / **added value**

Raising awareness & disseminating results

Involving **target groups and local stakeholders**

Respecting national requirements / **legal constraints**

Ensuring implementation and sustainability of the project results

Inter-institutional cooperation projects

Only organisations can be beneficiaries

Project Management
Partnership/cooperation agreement

➢ **Mandatory**

   ➢ **To be provided 6 months** after start of project (**joint** or **bilateral** document)

➢ **Covers <u>all aspects</u> of the project:**

- The partners role and responsibilities
- Financial Management
- Project Management and decision-making process
- Project Quality Assurance
- Decision/Conflict resolution mechanisms

➢ **National constraints/legislation**

   ➢ National constraints/legislation of the project partners must be taken into account

➢ **Must be negotiated with partners**

Monitoring and support
Desk Monitoring

Monitoring is a management tool and continuous process which aims to help the project in achieving its objectives.

Desk Monitoring > EACEA Each project has an assigned PO

➢ To support the Project coordinators

➢ Track the project progress through evaluation of the progress and final report

Monitoring and support
Field Monitoring

Part of the monitoring strategy of EACEA Agency

➢ Annual Monitoring Plan

➢ Conducted by NEO/ EU Delegation/ Project Officer

➢ Countries where NEOs is present:

   ➢ NEO mandate

   ➢ National plan communicated to each NEO

Aim of Monitoring visit

➢ Check that the project is on track

➢ Check that partners are fully involved in the project

➢ Offer support and advice

➢ Prevent penalties due to weak project implementation

Budget overview
Basic principles

Staff costs	**Max 40% of total eligible costs**
Equipment	**Max 30% of total eligible costs**
Sub-contracting	**Max 10% of total eligible costs**
Travel	**No threshold**
Costs of stay	**No threshold**

Budget overview

5 Budget Categories

Staff	UC
Travel	UC
Costs of Stay	UC
Equipment AC
Subcontracting

2 Allocation & Justification Methods

Actual Costs (AC)

Unit Costs (UC)

Other types of costs (ex.: overheads costs, etc.) are not considered for the calculation of the grant.

Co-funding principle
Grant awarded ≠ Total costs of the project

Budget overview

Unit costs values mentioned in the **Guidelines: <u>ONLY</u>** for:

- ➢ Budget calculation
- ➢ Reporting purposes

Consortium reimbursement mechanisms

- ➢ Should be different from the values mentioned in the Guidelines
- ➢ Agreed by consortium
- ➢ Described in Partnership Agreement

Budget
Supporting documents for unit costs

Budget Headings	Examples of Supporting documents
Staff	▪ Formal employment contract ▪ Staff convention ▪ Time sheets ▪ Agendas & Minutes of the meetings ▪ Attendance / Participant lists ▪ Tangible outputs/products
Travel and Costs of Stay	▪ Individual Mission Report (IMR) ▪ Invoices, receipts, boarding passes ▪ Agendas & Minutes of the Meetings ▪ Attendance / Participant lists ▪ Tangible outputs/products

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Budget
Supporting documents for actual costs

Budget Headings	Supporting documents
Equipment	• Invoices • Bank statements • Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€
Sub-contracting	• Subcontracts • Invoices • Bank statements • Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€

Equipment rules

Equipment purchase limited to HEIs only
  ➢ HEIs recognised by Ministry of Education

Changes to the list of equipment
  ➢ Possible if well justified
  ➢ Must be authorised by Agency

Launch purchase asap
  ➢ Tender procedure takes time
  ➢ Start using the equipment during the project's lifetime
  ➢ Risk of ineligiblity of the costs
  ➢ No second purchases!

Subcontracting rules

Amount of subcontract	Tasks to perform
Over 10.000 EUR	Ask authorisation to the Agency
Over 25.000 EUR	Tendering procedure ▪ In conformity with national legislation ▪ Three quotes at least

Reporting periods:

1) From month 1 to 21 (or to 15 for 2-year projects)
2) From month 22 (or to 16 for 2-year projects) to end of the project

Reporting requirements:

1) Within 2 months from end of reporting 1: progress report
2) Within 2 months from end of the project: final report

Payment modalities:

1st pre-financing: 50%	Upon entry into force of the GA ✍

2nd pre-financing: max 40%	Request must be submitted: ➢ Within 2 months from end of period 1 ➢ *Amount will be 40% of grant awarded* <u>*or*</u> *less if actual budget spent is below 70% of 1st pre-financing paid*

balance	At final reporting stage

Exchange rate

1) For beneficiaries with General Accounts in a currency other than the EURO: the average rates in accordance with Art. I.4.6 of the Grant Agreement should be applied following the applicable reporting period:

Reporting period 1 = average rate from month 1 until end of reporting period 1

Reporting period 2 = average rate from 1st month of reporting period 2 until the end project eligibility period

2) General accounts in EURO: usual practices of your institution

Dissemination and visibility
Visual identity – requirements

LOGO

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…added to the inner pages of the **publications** and **studies** written with support from the European Commission!

It is a MUST!

The Agency may apply a 20% reduction of the grant initially provided for (Article II.7)

QUESTION NOT ANSWERED?
Please contact the E+CBHE team

EACEA-EPLUS-CBHE-PROJECTS@ec.europa.eu

Don't forget to mention your project number!

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