Guidelines to the local participant
for organisation of the visit

The visit should cover the following elements

I. The International Strategy and project management approach at the University level

For this part of the meeting representatives from the different department/services concerned should be involved and, if applicable, visits to some of these department/services (for instance the international relations or the finance departments) organised.

I.a **A short presentation of the University** covering in particular its internationalisation strategy and its participation in international cooperation (/mobility) programmes supported by the EU and other funding bodies. This issue can be discussed at the meeting with the Rector (Vice-Rector), as well as with the project team.

I.b **A short description of the overall management of EU (/Tempus) projects in the university,** for what concerns the strategic decisions (i.e. who decides on which funding proposal to present or to be involved in) as well as the on-going implementation, monitoring and dissemination of the projects. Aspects such as the nature, size and role of the different services involved (e.g. international Relations, Students, Quality Assurance, etc.) and the synergies (/communality of approaches) between the different projects will have to be addressed. This issue can be discussed at the meeting with Rector (Vice-Rector) and with the project team.

I.c **A presentation of the financial management of EU funds in the university** in terms of services involved (e.g. is there as special division for EU funds), shared responsibilities with the project teams, authorising bodies, etc.

II. The monitoring of the project implementation
This part of the meeting will assess the implementation and management strategy followed by the project team(s) in order to reach the project's objectives, and the progress made in the project's implementation. The Tempus aims to promote voluntary convergence of HEI systems in the partner countries with EU policies and processes in higher education.
Therefore special attention should be paid to the European dimension of the project and how it addresses the Bologna action lines (European Credit Transfer System—ECTS, Diploma supplement, learning outcomes, three–cycle system, Dublin descriptors) . The participation will include the key actors in the project team as

well as stakeholders and/or target groups if relevant (in particular for projects involving student/staff mobility and training)
The issues to be addressed will concern:

II.a The organisation of the project team(s) within the partnership in terms of decision making bodies (composition, periodicity of meetings, coverage of the partnership agreement), distribution and monitoring of tasks (responsibility for the different work packages), stability of the teams (/changes as compared to key actors in the application), communication methods, etc. Special attention should be paid to the involvement of all project teams in implementing different work packages, and not only for which they are responsible for.

II.b Presentation of the activities carried out as compared the original application in terms of timing (has the original calendar been respected and if not, why and how will the delays be addressed), nature and quality of the outputs produced so far, involvement of (/awareness raising towards) the different stakeholders and target groups, project dissemination strategy and activities carried out so far (including a presentation of the project website), etc. Special attention should be paid to the methodology of project implementation that should be agreed on at either the kick-off meeting, or at a separate methodology workshop. This specifically concerns the JP on curricula development.

II.c Usage of the grant in terms of volume and nature of the expenditure carried out so far, payment modalities between the coordinating institution and the partners, relations with the central financial services (see I.c above)

II.d Lessons learned: main obstacles/problems encountered and remedial actions taken; key achievements and most positive aspects in the implementation so far, best practices.

For each quality criteria the questions to be addressed are the following:

Relevance	- To what extent are the expected results, activities and overall objectives still valid? - Is the project being flexible to changing needs (adaptations to external and internal factors, modifications to work plan and budget)? - Has it been necessary to adapt the original rationale for the project to meet changing needs of the partner institutions? If yes, - How is the project addressing these external changes? Has this been foreseen in the original application?

Efficiency	➢ Are the project inputs/activities on time, well managed on a day-to-day basis? ➢ What management and quality assurance (internal and external) bodies have been set up? Are their action plans available? Have the indicators for internal quality monitoring of the project progress been identified? ➢ Are timely and appropriate decisions being made to support effective implementation and problem resolution? ➢ Have the planned results so far been delivered? Are the quantity indicators verifiable?
Effectiveness	➢ How are the activities contributing to the expected results? ➢ Have the methodology for project implementation been worked out and agreed on? ➢ Is the European dimension visible (in line with the Bologna action lines)? ➢ Have the obtained results since the beginning of the project contributed to the project purpose / objectives? ➢ What is the level of stakeholder participation in the management / implementation of the project? ➢ Are the benefits of the project being received by the planned beneficiaries? ➢ Are there any sleeping partners? ➢ How do the partners contribute to achieving the project objectives/expected results? ➢ Are spin-off effects or other secondary uses, planned or not, consistent with the project objectives?
Potential for sustainability	➢ What is the level of policy support provided to the project? ➢ How does the management team ensure the visibility, dissemination and exploitation of the project activities and results?

	➢ Are there any measures to guarantee the sustainability of the project outcomes beyond the project lifetime (e.g. arrangements concerning ownership, copyright etc.)? Are there any follow up plans?
Potential impact	➢ Questions in relation with the initial objectives of the project ➢ Have there been any external evaluation of the project to measure the impact of the results?

Questions on financial management

General financial management by the beneficiary	Has the project been given an own identification number/account for the financial management? How is the financial management/accounting organised by the beneficiary? Who is authorised to accept expenses to the project? How is done the follow-up of expenses? By excel sheets? Are all supporting financial documents in place?
Financial arrangements between the beneficiary and co-beneficiaries	How often do the co-beneficiaries report their expenses? How and when are payments/reimbursements done to the co-beneficiaries? Are copies of receipts/invoices of co-beneficiaries kept? Who keeps justifications, how and when are justifications transmitted to the beneficiary? How are money transfers between the beneficiary and the co-beneficiaries recorded? On which basis are they done? Claim from co-beneficiaries?
Costs incurred so far	Are the costs incurred so far in line with the estimated budget? Is the foreseen splitting of the budget between headings in line with the estimated budget?
Revenues	Is there additional funding from other EU programmes

	Is there other funding?
Follow-up of costs by budget headings	**Staff costs** Are there timesheets? How does the project manager follow up the worked hours? Please provide an example of timesheet.
	Travel costs Are the ceilings for per diem respected?
	Subcontracting Is there any subcontracting planned in the budget? Has there been any subcontracting so far? With Call for tender if the amount was above the threshold mentioned in the grant agreement? Do you have common guidelines within the project for subcontracting procedures? What is the invoicing and payment practice?
Additional questions for better understanding the financial rules	**Do you have questions on specific rules, such as:** - eligibility of costs - exchange rates - transfers between headings - definition of subcontracting - interests on pre-financing - depreciation - any other issue, please specify:

III. Documents for the meeting
The project team should prepare a folder with key documentation related to project management, including (for instance)
- Meeting agenda with the list of participants
- Copy of the Partnership agreement(s) signed within the partnership?
- Organogram of the project organisation with the identification of the responsible bodies/persons for what concerns the project management and the implementation of the different work packages;

- Minutes of the last coordination meeting
- Copy of the most relevant pages of the project website and any other dissemination material/results (e.g. leaflet, poster, brochure, media coverage, etc.)
- Copy of the Quality Assurance / Evaluation reports produced so far (if any)
- Copies of the products/output produced so far

Special attention should be paid to presenting the project activities and achievements to date in terms of the overall project and not only of the share of project activities the university team present at the monitoring session is responsible for.