



Jean Monnet Activities within the Erasmus+ Programme Grant Management & Procedures

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**Seminar for on-going Erasmus+ Jean Monnet
Projects**

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Reference Documents

Jean Monnet Programme Guide

Grant Agreement

Jean Monnet Project Handbook 2014 & 2015

- **Contracting procedure**
- **Implementation of the project**
- **Amendments**
- **Reporting procedures**
- **Financing systems**
- **Financial reports**
- **Calculation of grant**
- **Submitting a new proposal**



Contracting procedure (for projects selected in 2016)

- Notification letter informing about selection results
- In some cases – additional info requested by financial services
- Grant Agreement sent by email to the legal representative + coordinator
- Signature of 2 copies by the legal representative
- Counter-signature by the EACEA Authorising Officer
- Grant Agreement returned to the beneficiary institution
- Pre-financing payment launched
- Notification message confirming the payment
- Eligibility period starting on 1/09/2016



Implementation of the project

- Please inform the EACEA if there is any deviation to the original work plan (project team, timing, activities)
- Keep documents that will be necessary at the reporting stage

Amendments

- Principles of amendments
 - Respect of decision to award
 - Respect of equal treatment of applicants
- Modification request in writing
- Signed by legal representative
- Time limit



Amendments - categories

To the Agency via simple **email**:

- Change of academic coordinator/legal representative

To the Agency via **exchange of letters**:

- Modifications to budget, work-plan, eligibility period, bank account

Directly via the **Participant Portal** (REA):

- Change of legal status, legal name, address

Reports

Content (technical report)

- Assessment of project implementation v. work-plan
- Qualitative evaluation of results, dissemination and impact
- Interim and final reports (3-year projects)

Expenditure (financial report)

- Verification of eligibility of activities and costs
- Elements used as basis for grant calculation
- Final financial report only



Reports – submission procedure

- Official templates – E-reporting tool
- Online submission
- Supporting documents
- Financial report: for flat rate / for budget based (final reports)
- Deadlines
- Evaluation, follow-up, feedback

Reporting deadlines

Action type	Report	Due date
Modules, Chairs, Centres, Associations, Networks (3-years)	Interim technical	End of Year 1 (31st August)
	Final technical & Final financial	Within 2 months of the end date (31st October for 3-year projects)
Projects (12, 18, 24 months)	Final technical & Final financial	

E-reporting form

B - Overview of the process

The reporting process for granted projects requires electronic submission of project report(s), via the internet. This process is identical for all type of reports, such as **Interim** and **Final Reports**.

The steps in the reporting process can be seen in the schematic diagrams below.





E-reporting form

EReports are available via the Participant Portal at the following address:

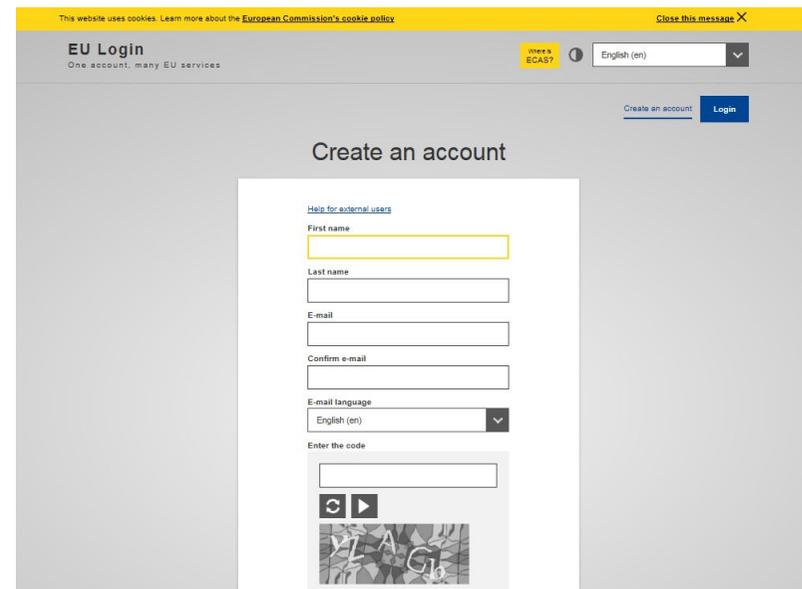
<http://ec.europa.eu/research/participants/portal/desktop/en/home.html>



E-reporting form

Two things are mandatory to have access the Participant Portal:

- To have an EU Login account (European Commission's Authentication Service - previous ECAS)
- To have a role assigned in the Participant Portal for the project. By default the person who is given access to eReport for a specific project is the one listed in the application form in the part A.2 as *Person responsible for the management of the application* (the coordinator). The LEAR does not have access rights to the E-reports!

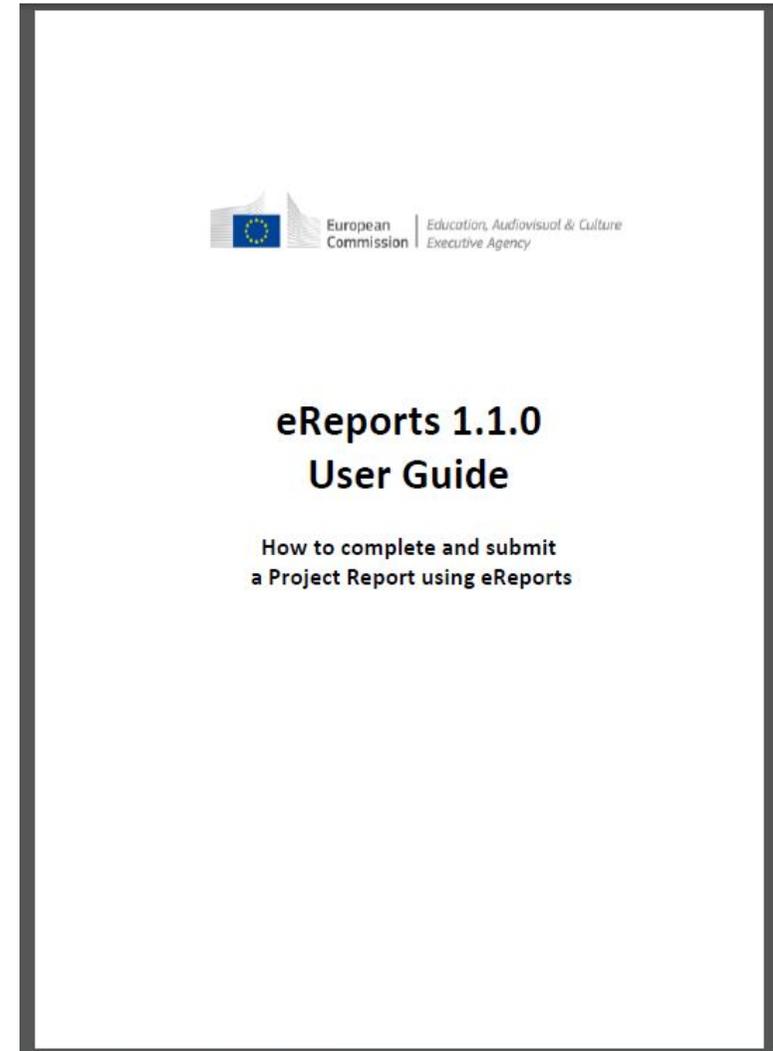


The screenshot shows the 'EU Login' interface for creating an account. At the top, there is a yellow banner with a cookie policy notice. Below it, the 'EU Login' logo and tagline 'One account, many EU services' are visible. A language selector is set to 'English (en)'. There are links for 'Create an account' and 'Login'. The main heading is 'Create an account'. A link for 'Help for external users' is provided. The form fields include: 'First name' (highlighted with a yellow border), 'Last name', 'E-mail', 'Confirm e-mail', 'E-mail language' (set to 'English (en)'), and 'Enter the code' (with a refresh and play button). A CAPTCHA image is at the bottom.

E-reporting form

Step-by-step instructions how to complete and submit the E-report are included in the e-Reports User Guide sent to project coordinators concerned.

Declaration of Honour that you need to fill in and upload with the eReport



Reports – evaluation, follow-up, feedback

- Verification formal requirements:
 - Acceptance
 - In full
 - With request for additional information (suspension)
 - Rejection
 - Request for corrected report (suspension)
- Assessment and decision on payment (final reports)



Budget based financing - financial rules

- Applied to **Jean Monnet Centres, Networks** and Support to **Associations**
- In the form of reimbursement 80% of eligible costs
 - eligible direct costs representing actually incurred expenditure budgeted by cost categories
 - indirect costs limited to 7% total eligible direct costs
- Based on eligible costs identified in General Conditions of the Grant Agreement

Budget based financing – financial rules

- Budget headings
 - Staff
 - Travel and subsistence
 - Equipment (10% limit)
 - Subcontracting (30% limit)
 - Teaching costs
 - Other costs
 - Indirect costs (7% total direct costs)



Budget based financing – financial report

- **Excel Financial Sheet** (based on the financial application form)
 - Completed (approved implemented)
- **Declaration of Honour**
 - Certified reliable and true, coherent with financial sheet and the supporting documentation
- **Supporting documentation**
 - Results with European emblem and funding disclaimer
- **Signed**
 - By the legal representative of the beneficiary institution



Budget based financing – calculation of grant

- Reported eligible direct costs in EUR
- Minus ineligible costs
- Plus 7% of eligible direct costs
- Multiplied by % EU co-financing

= Final EU grant

- Minus pre-financing ➤ Balance Payment or Recovery



Flat rate financing - financial rules

- Applied to Jean Monnet **Modules, Chairs** and **Projects**
- Contribute up to 75% of the eligible costs
- Calculated on the basis of
 - National **hourly teaching** costs (Modules & Chairs)
 - **Number of participants** in conferences and events (Projects)
 - **"Top-up" percentage** to cover additional academic activities for Modules and Chairs (respectively 40% & 10%)
 - **Lump sum contribution** of 25,000€ to cover complementary activities for Projects



Flat rate financing - financial rules

Method of calculation only!

- Hours/Participants factor in the calculation but do NOT predetermine the use of the budget
- Grant should be used as a single amount to contribute to all planned activities
- Covers eligible costs but NO verification in terms of cost categories



Flat rate financing - financial report

- **Grant calculator** (based on the financial application form)
 - Completed (approved implemented)
- **Declaration of Honour**
 - Certified reliable and true, coherent with grant calculator and the supporting documentation
- **Supporting documentation**
 - Justify the number of teaching hours (Modules & Chairs)
 - Conference participants and days of the event (Projects)
(participant list with the number and names of all participants, including their signature)
- **Signed**
 - By the legal representative of the Beneficiary institution



Flat rate financing - calculation of grant

Module

- Reported actual number of teaching hours
- Minus number of hours refused following analysis of report
- Multiplied by "national teaching cost per hour"
- Plus 40% top up of eligible teaching costs
- Multiplied by 75% EU co-financing

= Final EU grant

(limited to maximum grant amount of 30,000€)

- Minus pre-financing ➤ Balance Payment or Recovery



Flat rate financing - calculation of grant

Project

- Local participants x duration x "national conference cost" for host
Plus
- Non-local participants x duration x "subsistence cost"
Plus
- Non-local participants x "unit costs" (per distance threshold)
- Repetition for ALL events plus lump sum of 25,000€
- Multiplied by 75% EU co-financing

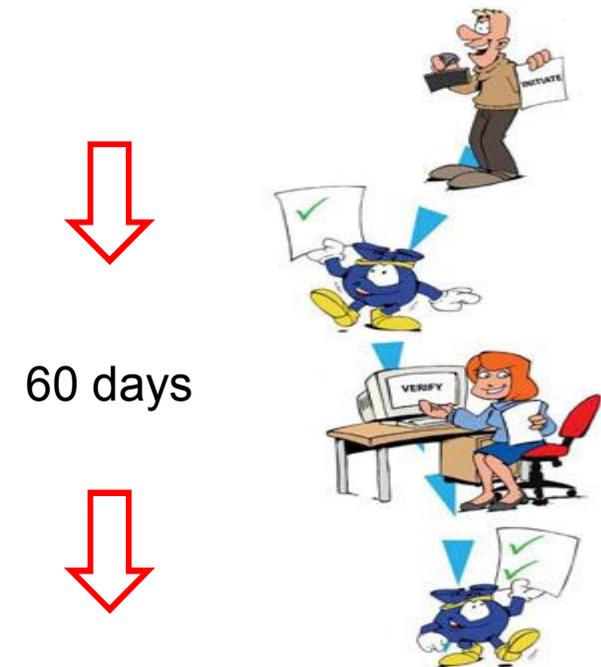
= Final EU grant

(limited to maximum grant amount of 60,000€)

- Minus pre-financing ➤ Balance Payment or Recovery

Final report assessment – both funding systems

- **Deadline to be respected**
- **Reception**
 - Registration (start delay of payment)
- **Assessment:**
 - Operational and financial analyses
 - Additional Information (suspension payment delay)
 - Approval letter
- **Payment or Recovery Order**
 - Bank transfer on the Bank account given in the application
 - (stop payment delay)



Weak implementation of a project

A pro-rata reduction will be applied if it is deemed that the action is not implemented, or is implemented poorly, partially or late. This is judged on basis of the agreed working plan and the agreed activities (e.g. teaching hours, number of participants if applicable).

foreseen



implemented



Audit

- **Supporting documentations**
 - All justifying documents related to the implementation of the project (invoices, tickets, boarding pass)
- **Originals**
- **To be keep for 5 years after** (after the end of the project – payment or recovery)





Information and dissemination tools

- **Jean Monnet Community online platform**

<http://jeanmonnet.ning.com/>

800 members

Discussion forum on different topics involving Jean Monnet professors

- **Jean Monnet Directory**

<https://eacea.ec.europa.eu/JeanMonnetDirectory/#/search-screen/>

Up-dated research tool providing data on all Jean Monnet projects

- **Erasmus+ Dissemination Platform**

<http://ec.europa.eu/programmes/erasmus-plus/projects/>

Information of projects, results and success stories

Information and dissemination tools

- **Jean Monnet Directory**

<https://eacea.ec.europa.eu/JeanMonnetDirectory/#/search-screen/>

Up-dated research tool providing data on all Jean Monnet projects



The screenshot shows the search interface for the Jean Monnet Directory. At the top, there is a navigation bar with the European Commission logo and the text 'EACEA Education, Audiovisual and Culture Executive Agency'. Below this is a breadcrumb trail: 'European Commission > EACEA > Jean Monnet > Directory Search'.

The search form includes the following fields:

- File Number:
- Country:
- Year:
- Town:
- University:
- Name of teacher:
- PIC number:
- Type of Project:
- Discipline:

Buttons for 'Submit' and 'Reset' are located below the form.

The search results are displayed in a table with the following columns: File No, Title, Type of Project, University, Discipline, and Professor in charge.

File No	Title	Type of Project	University	Discipline	Professor in charge
528841-LLP-1-2012-1-UA-AJM-MO	European integration strategy of Ukraine in the Eastern Partnership	European Module	Taurida National V.I. Vernadsky University	EU Economic Studies	Dr. Olga Yarosh
529031-LLP-1-2012-1-UA-AJM-MO	Training "European Union Innovation and Investment Development"	European Module	KYIV NATIONAL ECONOMIC UNIVERSITY VADYM HETMAN	EU Economic Studies	Prof. Viktor CHUZHYKOV
542469-LLP-1-2013-1-UA-AJM-MO	European Union and Ukraine Relations in Focus: Neighbours or Members?	European Module	Odesa Mechnikov National University	EU Economic Studies	Prof. Sergey YAKUBOVSKIY
542844-LLP-1-2013-1-UA-AJM-MO	Immersion into the EU: training for school teachers	European Module	CHERKASY REGIONAL INSTITUTE OF POSTGRADUATE EDUCATION	EU Interdisciplinary Studies	Doctor Natalia Chepurna

At the bottom of the table, there is a pagination control showing '20 items per page' and '1 - 9 of 9 items'.

Information and dissemination tools

- **Erasmus+ Dissemination Platform**

<http://ec.europa.eu/programmes/erasmus-plus/projects/>

Information of projects, results and success stories



Erasmus+ Dissemination Platform



Erasmus+ Project Results Platform ec.europa.eu/programmes/erasmus-plus/projects/

What is it?

The Erasmus+ Project Results Platform is the European Commission's database for the Erasmus+ Programme.

It contains descriptions of all projects funded under the programme, including contact information for the organisations involved. It also contains results for projects that have ended, including links to websites.

Success stories, or projects that have had exceptional results in terms of policy relevance, communication potential, impact or design, are highlighted on the platform. They have been selected from a wider pool of good practice examples, or well-managed projects with very good results.

Why should you use it?

1. To enhance the visibility of your project
2. To share the results of your project with other people interested in the same topics
3. To find inspiration
4. To find partners for future projects

How can you use it?



From the public interface, you can use the search criteria available (by programme, year, country, keyword, etc.) to find exactly the kind of project you are looking for.

If you are a beneficiary, you have access to a **beneficiary's dashboard**, using the **credentials** provided to you after the signature of the grant agreement. You can add **project results**, a **website address** or other **information** to your project card.



What if you need help?

Turn to the dedicated helpdesk:

EAC-PROJECTSPLATFORM-HELPPESK@ec.europa.eu

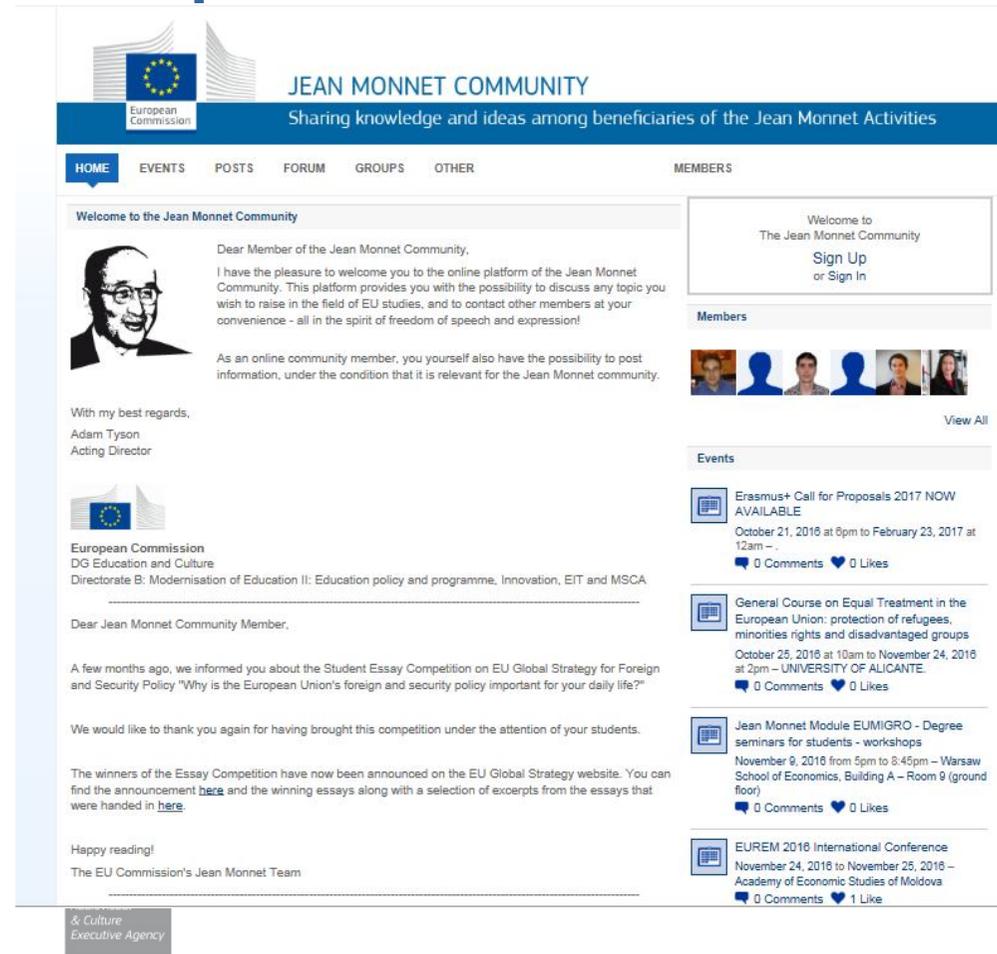
Information and dissemination tools

- **Jean Monnet Community online platform**

<http://jeanmonnet.ning.com/>

800 members

Discussion forum on different topics involving Jean Monnet professors



The screenshot displays the homepage of the Jean Monnet Community. At the top, there is a navigation bar with the European Commission logo and the text "JEAN MONNET COMMUNITY" and "Sharing knowledge and ideas among beneficiaries of the Jean Monnet Activities". Below this, there are tabs for "HOME", "EVENTS", "POSTS", "FORUM", "GROUPS", "OTHER", and "MEMBERS".

The main content area features a welcome message from Adam Tyson, Acting Director of the European Commission DG Education and Culture. The message includes a portrait of Adam Tyson and text welcoming members to the online platform, highlighting the opportunity to discuss EU studies and contact other members. It also mentions the possibility of posting information as an online community member.

Below the welcome message, there is a section for "Events" listing several upcoming activities:

- Erasmus+ Call for Proposals 2017 NOW AVAILABLE**: October 21, 2016 at 6pm to February 23, 2017 at 12am. 0 Comments, 0 Likes.
- General Course on Equal Treatment in the European Union: protection of refugees, minorities rights and disadvantaged groups**: October 25, 2016 at 10am to November 24, 2016 at 2pm - UNIVERSITY OF ALICANTE. 0 Comments, 0 Likes.
- Jean Monnet Module EUMIGRO - Degree seminars for students - workshops**: November 9, 2016 from 5pm to 8:45pm - Warsaw School of Economics, Building A - Room 9 (ground floor). 0 Comments, 0 Likes.
- EUREM 2016 International Conference**: November 24, 2016 to November 25, 2016 - Academy of Economic Studies of Moldova. 0 Comments, 1 Like.

At the bottom of the page, there is a footer for the European Commission DG Education and Culture Executive Agency.



Planning a new proposal?

Call for proposals

One call for proposals per year – part of the general Erasmus+ call published in October 2016:

https://eacea.ec.europa.eu/erasmus-plus/funding/jean-monnet-activities-2017_en

All details in the Erasmus+ Programme Guide

Deadline 23/02/2017

12:00 (CET, Brussels time)



More information – Jean Monnet

- **Erasmus+ Programme Guide and 2017 General Call for proposals:**
http://ec.europa.eu/programmes/erasmus-plus/discover/guide/index_en.htm
- **Jean Monnet Activities:**
http://eacea.ec.europa.eu/erasmus-plus/actions/jean-monnet_en
- **Funding - Jean Monnet Activities within Erasmus+:**
http://eacea.ec.europa.eu/erasmus-plus/funding_en
- **Jean Monnet Directory:**
<https://eacea.ec.europa.eu/JeanMonnetDirectory/#/search-screen/>
- **Jean Monnet selection results:**
http://eacea.ec.europa.eu/erasmus-plus/selection-results_en
- **Jean Monnet Cluster 2016: Good practices in the context of 'A Union of shared values – The role of Education & Civil Society'**
http://eacea.ec.europa.eu/erasmus-plus/library_en
- **Erasmus+ Project Results:**
<http://ec.europa.eu/programmes/erasmus-plus/projects/>
- **Mailbox Jean Monnet:** EACEA-AJM@ec.europa.eu



More information on Jean Monnet activities:

Please **send an e-mail** to the Jean Monnet team at:
EACEA-AJM@ec.europa.eu

Contact for **UA projects**:
Joanna-Maria.Pesch-Konopka@ec.europa.eu



Thank you for your attention!