- ➢ State of play of your project's contractual process

- ➢ First Steps in the implementation phase

- ➢ Partnership Agreement

- ➢ Financial management

- ➢ Communication and Dissemination

- ➢ Field monitoring

- ➢ Quality assurance

- ➢ Changes to the project

- ➢ Special Mobility Strand

- ➢ Conclusions

State of play of your project's contractual process

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State of play of your project's contractual process

Grant Agreement

- ➢ Issued before Christmas
- ➢ PIC issues ⚠
- ➢ Start of the eligibility period: 15 October 2017

Payment

- ➢ First instalment at contract signature (50% of the grant)

First steps in the implementation phase

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Ensure the commitment of your institution

Institutional commitment is a precondition to success:

At HEI level:

- ➢ Academic authorities
- ➢ Finance Department, International Office
- ➢ Students and staff

At Ministry level

- ➢ Structural Projects

Will ensure:

- ➢ Expertise in terms of administrative/financial constraints
- ➢ National dissemination and Sustainability

Clarify the roles and learn the rules

Be aware of your role in the project

➢ Read the project description & objectives

➢ Find out what you are supposed to do

Read carefully all project contractual and financial documents

➢ To be provided by coordinator

➢ EACEA Agency website

➢ Project documents

▪ Grant Agreement

▪ Guidelines for the Use of the Grant

Take local rules into account

Find out about your Institution's internal rules

- ➢ Ask your administration
- ➢ Communicate these rules to the coordinator
- ➢ Nominate person responsible for finances at each Partner

Find out about national constraints/legislation

- ➢ Visa requirements
- ➢ Project registration
- ➢ VAT
- ➢ Staff payment modalities
- ➢ Accreditation of newly developed curricula

Cooperation with your project partners

Meet and discuss within your partnership:

- Distribution of tasks
- Financial provisions
- Rules (CBHE + your institution's)

Draft a Partnership agreement

- Agree with your partnership on the procedures you will adopt
  - Make sure you understand all the rules which will apply to you
  - Make sure you have a voice in the decision-making process
- Consolidate your agreements in writing
- Template available on Agency's website

Transparent Management

Partnership Agreement

Mandatory

> At the latest 6 months after signature of Grant Agreement

Must be negotiated with partners

Covers all aspects 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

Check for synergies with other projects

➢ Check if there are other Tempus/CBHE projects in the same subject area

➢ Check if there are complementarities

➢ Organise meetings with other projects to share:

- Outputs
- Experience
- Best practices

Financial Management

Reporting obligations and payments

Grant Agreement

- ➢ Start of the eligibility period: 15 October 2017
- ➢ End of the eligibility period: 14 October 2020

Reporting obligations

- ➢ Progress Report
- ➢ Final Report

Payments

- ➢ First instalment at contract signature (50% of the grant)
- ➢ Second instalment (40%)(when 70% of first instalment spent)
- ➢ Balance (10% max) after analysis of final report by EACEA
- ➢ Payment modalities within the consortium: defined in the Partnership Agreement

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Budget Categories : Thresholds

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**

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Project Budget Calculation & Reporting

5 Budget Categories

Staff — **UC**

Travel — **UC**

Costs of Stay — **UC**

Equipment — **AC**
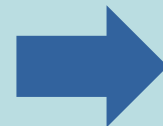
Subcontracting — **AC**

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.

➡ Expected to be **covered by co-funding**

Justification of the costs

Actual costs: How did you **use** the grant ?
- ➤ Expenses (/costs) incurred
- ➤ Supporting documents=proof of expenses (invoices, proof of payment et)

Unit costs: what did you **achieve** with the grant?
- ➤ Result-based (/based on proof of activity)
- ➤ No need to prove the real expenditure
- ➤ But need to prove the "triggering event" (i.e.: the fact the activity has taken place (e.g. teaching, training)

Unit costs

Unit costs values mentioned in the **Guidelines: ONLY** 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

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€ - Proof that it is recorded in the institution's inventory
Sub-contracting	- Subcontracts - Invoices - Bank statements - Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€ - Tangible outputs/products

For details: See Guidelines for the Use of the Grant

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Supporting documents for Unit Costs

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

For details: See Guidelines for the Use of the Grant

Equipment rules

Equipment can come from anywhere
- ➢ No Rule of Origin

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

Subcontracting / Equipment rules

Amount of subcontract	Tasks to perform
Over 25.000 EUR	Tendering procedure ▪ Three quotes at least
Over 134.000 EUR	Tendering procedure ▪ In conformity with national legislation

Communication and Dissemination

With Coordinator and other partners

- ➢ Project kick-off meeting
- ➢ Defined in the Partnership Agreement
- ➢ Communication-plan (means, frequency, channels)
- ➢ Transparency

National coordinator

- ➢ Main Partner Country contact for the project
- ➢ Facilitates communication with partners from Partner Countries
- ➢ Not compulsory

External Communication

With EACEA Agency

➢ One Project Officer responsible for your project

➢ Contact only possible via coordinator

➢ Exception: exceptional circumstances, e.g. conflict with coordinator

With your National Erasmus+ Office

➢ Support to projects

➢ Experience in Tempus/Erasmus+ projects

External Dissemination Strategy

- ➤ Draft **intentional** dissemination plan with **target groups**
  - ▪ What, Why, Who, When, How?

- ➤ Choose most suitable **methods** of dissemination for each audience

- ➤ Define the **expected impact** and **measure** it

Dissemination Tools

- **Visual Identity** for the project: project branding/logos

- Project **website**:
  - User-friendly
  - Launch at project start
  - Informative & attractive ALSO for wider public
  - Content: Project description/objectives, management structure, project outputs (dates of events, trainings, meeting etc), results of project activities

- Project flyers/leaflets/**brochures**

- **Media** releases, newsletters, articles in specialised press

- **Social media**: blogs, facebook, twitter

- Public **events**, meetings, seminars

Publicity / Visibility rules

Project publications and results:

- Must display **Erasmus+ Logo**

- Must mention this **sentence**: " *Co-funded by the Erasmus+ Programme of the European Union*"

Include **disclaimer**:

"This project has been funded with support from the European Commission. This publication [communication] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein".

See Agency's website: https://eacea.ec.europa.eu/about-eacea/visual-identity_en

Project Monitoring

Desk Monitoring

Definition

➢ Management tool
➢ Continuous process which aims to help the project achieve its objectives

Project Officer

➢ Each project has an assigned Project Officer in the Agency

Objective

➢ To support the Project coordinators
➢ Track the project progess through evaluation of the progress and final report

Part of the monitoring strategy of EACEA Agency

- ➤ Annual Monitoring Plan
- ➤ Conducted by NEO/ EU Delegation/ Project Officer
  - ▪ NEO mandate
  - ▪ National plan communicated to each NEO

Aim of Monitoring visits

- ➤ 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

Field Monitoring Visits (2/3)

Format

- ➢ Presentation of state-of-play by all partners
- ➢ Recommendations from NEO / Project Officer

Role of EACEA Agency

- ➢ Feedback to project coordinator
- ➢ Occasional participation in monitoring visits

Each project will be visited at least once in each Partner Country

Key Messages:

➢ Special emphasis on the **sustainability/impact** of the projects and on the **dissemination/exploitation** of the results (use Annex II of Programme Guide as guidance doc.)

➢ For that purpose the general and specific project **objectives** need to be **clear from the start** of the project for each participant to the project

➢ Measure and document: project **activities** should be continuously **evaluated against the project goals** (based on the needs analysis) through figures, questionnaires, interviews, analysis etc.

Quality Assurance

Quality Assurance

➢ Instrument of monitoring process towards **achieving the project goals**

➢ Ensures increased **sustainability & impact** of activities and project results

➢ Designed both for **accountability** & ongoing **improvement**

Internal vs. External Quality Assurance

Internal Quality Assurance

➢ Follow up and monitoring of activites (tools: roadmaps, Gantt charts, dashboards etc.)

➢ Assessing & measuring that the activities are in line with the project objectives (Logical framework, SWOT analysis etc.)

➢ Internal peer review of the quality of the products

External Evaluation

➢ Peer-review by academic/admin staff from non-partner HEIs

➢ Representatives from local authorities / private companies

➢ National QA Agencies (only if the integrated international dimension of the project is covered)

Special Mobility Strand

Special Mobility Strand (SMS) rules

Definition

- ➤ Additional support for international mobility of students and staff
- ➤ for studying, training and teaching purposes

Conditions

- ➤ Students must be enrolled in an HEI of the consortium
- ➤ be at least in the second year of higher education studies (for study mobility only)

Associate partners cannot benefit from the SMS

![Erasmus+ logo](EU flag with Erasmus+ text)

STUDENTS

Activities	From Partner C To Partner C	From Partner C To Programme C	From Programme C To Partner C	From Programme C To Programme C
Study	X	X	X	Not eligible
Traineeship	X	X	X	Not eligible

STAFF

Activities	Staff from beneficiary HEIs	Staff from no HEI beneficiaries	From PC To PC	From PC To PgC	From PgC To PC	From PgC To PgC
Teaching	X	X	X	X	X	Not eligible
Training	X	Not eligible	X	X	Not eligible	Not eligible

SMS documents

SIGNED BY:

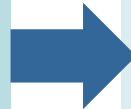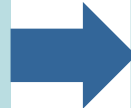|	
Inter-institutional agreement (General Framework) →	**each project partner** *(before starting the selection of the mobility scheme)*
Individual Grant Agreement (Duration & Financial Support) →	
Learning and Mobility Agreement (Content & Credits / Learning Outcomes) →	▪ **the individual** ▪ **the sending organisation** ▪ **the receiving organisation** *(before the start of the individ. mobility)*

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Each mobility must be encoded in the Mobility Tool.

Subsistence costs automatically calculated

Agreement Nbr	Title	Coordinating institution	Project duration
2015-CB	TEST JP 10-11	ECOLE NATIONALE SUPERIEURE DE TECHNIQUES AVANCEES BRETAGNE	24

Application Year	Mobility start (D/M/Y)	Mobility end (D/M/Y)	Eligibility start	Eligibility end	Save dates
2015	15/10/2015	14/10/2017	15/10/2015	14/10/2017	

Country	Consortium partners (show/hide)	Status

Coordinator (show/hide)	Telephone	Email

Contractor (show/hide)	Telephone	Email

Students CB
Main List [+] | Non-Scholarship holders [+]

Category	Default quota	Specific Quota	Persons/Qta	Add to a list	Bulk Phases Change Dates
Programme Country	100	100	7 / 100	Add to selected category	
Partner Country	100	100	4 / 100	Add to selected category	
		Validate			

all | none

Staff CB
Main List [+] | Non-Scholarship holders [+]

Category	Default quota	Specific Quota	Persons/Qta	Add to a list	Bulk Phases Change Dates
Programme Country	100	100	9 / 100	Add to selected category	
Partner Country	100	100	4 / 100	Add to selected category	
		Validate			

Changes to the project

Changes to the project

Administrative changes (PIC)

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

Functional 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

➢ At the latest 1 month before the project's end date

➢ The Agency will ask for supporting documents

➢ If the change is accepted: an amendment will be carried out if needed

Conclusions

Recap: Novelties CBHE vs. Tempus

➢ Equipment: no Rule of origin anymore
➢ Special Mobility strand
➢ Unit costs
➢ Supporting documents for staff and travel costs (unit costs)
➢ No need to justify co-funding anymore
➢ Indirect costs: not covered by the grant anymore
➢ Partnership agreement mandatory
➢ Payment instalments: 50 - 40 - 10%
➢ Penalties if weak project implementation
➢ Associated partners
➢ PICs

Key 'take aways' from presentation

Prevent future problems:

- ➢ Learn & understand the CBHE rules

Prerequisites for effective implementation:

- ➢ Communication- plan
- ➢ Quality assurance strategy
- ➢ External dissemination strategy
- ➢ Sustainability and exploitation strategy

Real partnership:

- ➢ Requires genuine engagement and conversations
- ➢ Take your place in the partnership (full partners have rights & obligations)

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Grantholders' meeting

Dates
- ➢ 29-30 January 2018 (tbc)
- ➢ Brussels

Participants
- ➢ Coordinator + 1 PC Partner

Content
- ➢ Project management rules
- ➢ Financial rules

Ask information to your project coordinator

In case of doubt?

Do not hesitate to refer to:

- ➢ Contractual documents (Grant Agreement)
- ➢ EACEA website: http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en
- ➢ Guidelines for the use of the Grant
- ➢ Your coordinator / partners
- ➢ National Erasmus+ Office (NEO)
- ➢ EACEA Agency (through your coordinator)