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TEMPUS FOUNDATION OFFICE

Project Management, Reporting and National Erasmus+ Office monitoring

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Content

- → Elements of good management models in CBHE projects
  - → Relevant documents to be aware of…
    - → Reports and monitoring
      - → Additional details to be taken care of concerning financial aspects
        - → Some challenges

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Elements of good project management

- Awareness of Erasmus+ rules
- Good planning
- Clear division/delegation of tasks and responsibilities
- Project teams at each of partner institutions (consisting of managing, teaching, administrative and technical staff)

- Transparent decision-making procedures
- Communication & continuous self-evaluation
- A problem-solving approach

- Support of national and institutional authorities
- Appropriate dissemination of project results

Good practice

- Detailed partnership agreements
- Efficient and easy to use communication & management tools – like Doodle, mailing lists, Google docs, Trello…
- Cash flow tables
- Clear instructions on how to fill the requested documents – a manual with samples
- Regular internal reporting and checking of documents
- Internal monitoring – *use of the LFM and WP, paying attention to delivery dates*

Relevant documentation that all partners should be aware of:

1. Full text of the project proposal (including budgetary allocations)
2. Text of the Grant Agreement and all its annexes
3. Guidelines for the Use of the Grant for CBHE projects
4. Frequently asked questions for projects
5. Management is based on Grant agreement and other previously presented relevant documents, as well as on partnership agreements applicant institution is signing with all partners in the project

The account or sub-account must identify the project payments – it is highly recommended for all the partners to have separate project accounts to identify transactions more easily.

→ All relevant documentation at: https://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en

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Partnership agreement

- ✓ The Agency provides a **template** with core elements that might help to draw PA
  - ✓ Consistency with the GA
  - ✓ Multilateral (one document signed by all partners) or Bilateral (partner A + coordinating inst.)
  - ✓ Deadline - **6 months of the signature of the GA**
- ✓ Main topics to be covered:
  - → Bank accounts (beneficiary/coordinator)
  - → Finances & activities
  - → Eligible costs
  - → Liability
  - → Decision making process - voting, measures that are at disposal to the coordinator
  - → Ownership of the results
    - → all materials produced under the scope of the project must be made available for the public, in digital form, freely accessible through the Internet under open licenses
  - → Confidentiality & personal data protection
  - → Conflict of interest

Financial and reporting rules

1. Three installments:
   - 1st installment - 50% of the Grant
   - 2nd installment - 40% of the Grant - ½ of the eligibility period following the Progress report and after having used at least 70% of the 1st installment
   - 3rd installment - 10% of the Grant

2. **If less than 70% of the 1st installment has been used, the 2nd installment will be reduced by the difference between 70% and the amount used**

3. Transfer between budget headings is possible but not more than 10% without consent of the EACEA

Financial and reporting rules

1. Agency shall reduce the amount of the final Grant in the event of weak implementation. Out of total 100 points the reduction of the grant will be of:
   - 25% if the project scores at least 40 points and below 50
   - 35% if the project scores at least 30 points and below 40
   - 55% if the project scores at least 20 points and below 300
   - 75% if the project scores below 20

2. Tendering procedure for all contracts awarded between EUR 25000 and EUR 134000
   - Without splitting the purchase

3. Conversion into EURO of actual costs
   - on the month of the first pre-financing
   - on the month of the receipt of the second pre-financing
     - http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm

Financial and reporting rules

Two types of costs:

→ **Unit Costs**

- Output based, "triggering event" (i.e. the fact the activity was indeed properly implemented and output produced (e.g. teaching, training)
  - **Staff Costs**
  - **Travel costs** - distance calculator: http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm
  - **Costs of Stay** - partner/programme country mobility; for partner countries dependent of the housing country and number of days

→ **Real Costs**

- Input based, Expenses incurred, supporting documents
  - **Equipment**
  - **Sub-contracting** - **exceptional for services related to competences that can't be found in the consortia**

→ **Other types of costs:**

dissemination, publishing, overheads costs, etc. expected to be covered by co-funding

Reports and monitoring by the EACEA and NEOs

- Monitoring done by the National Erasmus Offices:
  - ❖ Preventive* (in the first year of project implementation)
  - ❖ Advisory* (after the first half of project implementation)
  - ❖ Impact (after the end of the project - **sustainability check**)

*NEO monitoring is based on **deliverable achievement**

NEOs monitoring

- → NEO reports are sent to EACEA desk officer
- → NEO monitoring questionnaire contains questions about:
  - **Implementation** –are project activities being implemented on time and in line with the project application?
  - **Impact** – at the level of departments, faculty, university….
  - **Sustainability** – what would stay after the project is finished?
  - **Relevance** – is project still relevant in terms of its goals and achievements?
  - **Partnership & Cooperation** – quality of the project team and cooperation
  - **Horizontal issues** – Are the recommendations given by the evaluation experts/NEOs/ Agency taken into account?
- → Materials to be submitted to NEO Serbia usually include:
  - Accurate data on institution project team
  - Information on events and conferences
  - Information on all relevant outcomes/outputs
  - Minutes of the meetings...

Some (hopefully) useful remarks

- Be aware of the ineligible costs (e.g. VAT, hospitality costs, seminars, symposia, conferences, congresses, etc.)

- For all questions that not clearly covered by above documents contact:
  - ✓ 1. EACEA desk officer
  - ✓ 2. NEO – project officer responsible

- Communication with the EACEA goes through project coordinator

- Changes during the course of the project implementation have to be reported to and/or need to be approved in advance by EACEA:
  - ✓ Addition or withdrawal of co-beneficiary
  - ✓ Changes of contact persons
  - ✓ Changes in project work plan
  - ✓ Changes in budget headings over 10%, etc...

Challenges

- Purchase of the equipment – not splitting the purchase, recording in inventory books
- Some participants may have problems with their university/faculty authorities and might ask to **receive funding on their personal accounts**
- Some countries have complex governance in education
- Different and complex national legislations
- Different institutional procedures

The project team “is not alone”- University/services (in Serbia) are checking:

- ✓ Validity of payments before payment is done
- ✓ Collecting all copies of supporting documents
- ✓ Checking documents before sending them to EACEA
- ✓ Use specimen of previous, successfully closed projects as a model

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Thank you for your attention

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