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Capacity Building in the field of Higher Education

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Outline of the presentation

State of play of your project's contractual process

Communication

Field monitoring

Quality assurance

How to manage your project

Partnership Agreement

Changes to the project

Financial management

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

- ➢ Start of the eligibility period: 15/11/2018 or 15/01/2019

Reporting obligations

- ➢ Progress Report
- ➢ Final Report

Payments

- ➢ First instalment at contract signature (50%)
- ➢ Second instalment (40%)(when 70% of first instalment spent)
- ➢ Payment modalities within the consortium: defined in the Partnership Agreement

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

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

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External Dissemination Strategy

Draft **intentional** dissemination plan with **target groups** and most suitable **methods** of dissemination for each audience

➢ Visual Identity for the project: project branding/logos

➢ Project website:

➢ **User friendly**
  ➢ Launch at the beginning of the the project
  ➢ 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 etc.

➢ Media releases, newsletters, articles in specialised press

➢ social media- blogs, facebook, twitter

➢ Public Events, meetings, seminars

Field Monitoring

Field Monitoring Visits (1/3)

Part of the monitoring strategy of EACEA Agency

➢ Annual Monitoring Plan

➢ NEO mandate

➢ National plan communicated to each NEO

Aim of Monitoring visit

➢ Conducted by NEO/ Project Officer

➢ Check that the project is on track

➢ Check that partners are fully involved in the project

➢ Offer support and advice

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

Field Monitoring Visits (3/3)

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:** When implementing project activities they should be continuously evaluated against the goals (based on the needs analysis) of the project through figures, questionnaires, interviews, analysis etc.

Quality Assurance

Quality Assurance (1/2)

Rationale:

➢ Serves as a instrument of monitoring process towards **acheiving the project goals**

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

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

Quality Assurance (2/2)

1. **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

2. **External Evaluation**
- Peer-review by academic/administrative staff **from non-partner HEIs**
- Representatives from local authorities / private companies
- National QA Agencies as long as the integrated international dimension of the project is covered

How to manage your project

Be aware of your role in the project

➢ Read the project description & objectives

➢ Find out what you are supposed to do

Get to know 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

Be aware of your Institution's internal rules

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

Be aware of the national constraints/legislation

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

Meet and discuss with your consortium:

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

Draft a Partnership agreement

- ➤ Agree with your consortium 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

Partnership / Cooperation Agreement

➢ **Mandatory**

➢ **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

➢ **Must be negotiated with partners**

Institutional Commitment

Institutional commitment is precondition to success:

At HEI level:
- ➢ Academic authorities
- ➢ Finance Department, International Office
- ➢ Students

At Ministry level
- ➢ Structural Projects

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

Check for synergies with other projects

➤ Check if there are other CBHE projects in the same subject area

➤ Check if there are complementarities

➤ Organise meetings with other projects to share:
- Outputs
- Experience
- Best practices

![Erasmus+ logo]

Changes to the project

Administrative changes

➢ 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

➢ 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

Budget

![Erasmus+ logo]

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**

Project Budget Calculation & Reporting

5 Budget Categories

↓

Staff	**UC**
Travel	**UC**
Costs of Stay	**UC**
Equipment	**RC**
Subcontracting	**RC**

2 Allocation & Justification Methods

Real Costs (RC)   **Unit Costs (UC)**

Other types of costs (ex.: dissemination, publishing, 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 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€
Sub-contracting	- Subcontracts - Invoices - Bank statements - Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€

To be confirmed in the Guidelines for the Use of the Grant, which will be published on the Agency's website in the near future

Supporting documents for Unit Costs

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

To be confirmed in the Guidelines for the Use of the Grant, which will be published on the Agency's website in the near future

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

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

Conclusions

Key 'take aways' from presentation

- **Prevent future problems:**
- Learn & understand the CBHE rules

- **Prerequisites for effective implementation**:
  1) Communication plan
  2) Quality assurance strategy
  3) External dissemination strategy
  4) Sustainability and exploitation strategy

- **Real partnership:**

Requires genuine engagement and conversations

Take your place in the partnership (full partner has rights & obligations)

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)