



**Erasmus+**

Capacity Building

in the field of  
Higher Education

Ms. Piia Heinämäki



**Erasmus+**

NEO/HERE Meeting  
Brussels, 24 May 2016



# Erasmus+

---

- **How to manage your project**
- **Quality Assurance**
- **Communication**
- **Field monitoring**
- **Contractual process**
- **Budget**
- **Conclusions**



Erasmus+

---

## How to manage your project



# Erasmus+

## How to manage your project (1/3)

### **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
  - Frequently Asked Questions



# Erasmus+

## How to manage your project (2/3)

### **Be aware of your Institution's internal rules**

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

### **Be aware of the national constraints/legislation**

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





# Erasmus+

## How to manage your project (3/3)

### **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 in November 2015



# Erasmus+

## 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**



# Erasmus+

## Institutional Commitment

**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





# Erasmus+

## 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



Erasmus+

---

## **Quality Assurance**



# Erasmus+

## 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**



# Erasmus+

## Quality Assurance (2/2)

### 1. Internal Quality assurance

- Follow up and monitoring of **activities** (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



Erasmus+

---

# Communication



# Erasmus+

## Internal Communication (1/2)

### **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, but useful





# Erasmus+

## External Communication (2/2)

### **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



# Erasmus+

## External Dissemination Strategy

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

- **Visual Identity** for the project: project branding/logos
- **Project website** (informative, attractive, regularly updated)
- Project **flyers/leaflets/brochures** etc.
- **Media releases, newsletters, articles** in specialised press
- **Social media- blogs, Facebook, Twitter**
- Public **Events**, meetings, seminars



Erasmus+

---

## Field Monitoring



# Erasmus+

## Field Monitoring Visits (1/2)

### **Part of the monitoring strategy of EACEA Agency**

- Annual Monitoring Plan
- NEO mandated by EACEA to monitor projects
- 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



# Erasmus+

## Field Monitoring Visits (2/2)

### 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**



Erasmus+

---

## **Contractual process**





# Erasmus+

## Your project's contractual process

### Grant Agreement

- Start of the eligibility period: **15 October 2015**
- Agreements being prepared

### 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



Erasmus+

---

**Budget**



# Erasmus+

## Budget Categories : Thresholds

<b>Staff costs</b>	<b>Max 40% of total eligible costs</b>
<b>Equipment</b>	<b>Max 30% of total eligible costs</b>
<b>Sub-contracting</b>	<b>Max 10% of total eligible costs</b>



# Erasmus+

## 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.**



# Erasmus+

## 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))



# Erasmus+

## 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





# Erasmus+

## Supporting documents for Actual Costs

<b>Budget Headings</b>	<b>Supporting documents</b>
<b>Equipment</b>	<ul style="list-style-type: none"><li>▪ Invoices</li><li>▪ Bank statements</li><li>▪ Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€</li></ul>
<b>Sub-contracting</b>	<ul style="list-style-type: none"><li>▪ Subcontracts</li><li>▪ Invoices</li><li>▪ Bank statements</li><li>▪ Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€</li></ul>

**To be confirmed in the Guidelines for the Use of the Grant, which will be published on the Agency's website in December 2015**



# Erasmus+

## Supporting documents for Unit Costs

<b>Budget Headings</b>	<b>Supporting documents</b>
<b>Staff</b>	<ul style="list-style-type: none"><li>▪ Formal employment contract</li><li>▪ Staff convention</li><li>▪ Time sheets</li><li>▪ Agendas</li><li>▪ Attendance / Participant lists</li><li>▪ Tangible outputs/products</li></ul>
<b>Travel and Costs of Stay</b>	<ul style="list-style-type: none"><li>▪ Individual Mobility Report (IMR)</li><li>▪ Invoices, receipts, boarding passes</li><li>▪ Agendas</li><li>▪ Attendance / Participant lists</li><li>▪ Tangible outputs/products</li></ul>

**To be confirmed in the Guidelines for the Use of the Grant, which will be published on the Agency's website in December 2015**



# Erasmus+

## Equipment rules

### **No Rule of Origin**

- Equipment can come from anywhere

### **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



# Erasmus+

## Subcontracting rules

<b>Amount of subcontract</b>	<b>Tasks to perform</b>
<b>Over 10.000 EUR</b>	Ask authorisation to the Agency
<b>Over 25.000 EUR</b>	Tendering procedure <ul style="list-style-type: none"><li>▪ In conformity with national legislation</li><li>▪ Three quotes at least</li></ul>



Erasmus+

---

## Conclusions



# Erasmus+

## Recap: Novelities CBHE vs. Tempus

- Equipment: no Rule of origin anymore
- Unit costs
- No need to justify co-funding
- Indirect costs: not covered by the grant
- Partnership agreement mandatory
- Payment instalments: 50 - 40 - 10%
- Penalties if weak project implementation
- Associated partners
- PICs





# Erasmus+

## 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 communication

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



# Erasmus+

## 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](http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)
- Guidelines for the use of the Grant
- Frequently Asked Questions (FAQs)
- Your coordinator / partners
- National Erasmus+ Office (NEO)
- EACEA Agency (through your coordinator)



# Erasmus+

