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Capacity Building

in the field of

Higher Education

Ms. Piia Heinämäki



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



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How to manage your project



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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



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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



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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



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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**



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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



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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



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Quality Assurance



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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**



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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



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Communication



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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



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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



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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



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Field Monitoring



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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



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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



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Contractual process



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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



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Budget



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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



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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.**



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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))



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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



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Supporting documents for Actual Costs

Budget Headings	Supporting documents
Equipment	<ul style="list-style-type: none">▪ Invoices▪ Bank statements▪ Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€
Sub-contracting	<ul style="list-style-type: none">▪ 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 December 2015



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Supporting documents for Unit Costs

Budget Headings	Supporting documents
Staff	<ul style="list-style-type: none">▪ Formal employment contract▪ Staff convention▪ Time sheets▪ Agendas▪ Attendance / Participant lists▪ Tangible outputs/products
Travel and Costs of Stay	<ul style="list-style-type: none">▪ Individual Mobility 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 December 2015



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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



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Subcontracting rules

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



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Conclusions



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Recap: Novelties 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



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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)



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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
- Frequently Asked Questions (FAQs)
- Your coordinator / partners
- National Erasmus+ Office (NEO)
- EACEA Agency (through your coordinator)



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