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Capacity

Building in the
field of Higher
Education



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State of play of your project's contractual process

Grant Agreement

- Issued as from October 2015
- PIC issues 

Reporting obligations

- Intermediary report
- Final report

Payments to the coordinator

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



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Institutional Commitment

Institutional commitment is essential:

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



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Communication internal to the consortium

With Coordinator and other partners

- Project kick-off meeting
- Defined in Partnership agreement

National coordinator

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



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External Communication

With your National Erasmus+ Office

- Support to projects
- Experience in Tempus/Erasmus+ projects

With EACEA Agency

- One project Officer responsible for your project
- Contact only possible via coordinator
- Exception: exceptional circumstances, e.g. conflict with coordinator.



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Grantholders' meeting

Dates

- 27-28 January 2016
- Brussels

Participants

- Coordinator + 1 PC Partner

Content

- Project management rules
- Financial rules

Ask information to your project coordinator



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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

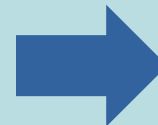
Subcontracting RC

2 Allocation & Justification Methods

Real Costs (RC)

Unit Costs (UC)

Other types of costs (ex: dissemination, 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

Real costs: How did you **use** the grant ?

- Expenses incurred
- Supporting documents

Unit costs: what did you **achieve** with the grant?

- Result-based
- No need to prove the actual 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



Supporting documents for Real 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 at the end of 2015



Supporting documents for Unit Costs

Budget Headings	Supporting documents
Staff	<ul style="list-style-type: none">▪ Formal employment contract▪ Staff convention▪ Timesheets▪ Agendas▪ Attendance / Participant lists▪ Tangible outputs/products
Travel and Costs of Stay	<ul style="list-style-type: none">▪ 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 at the end of 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



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 from different suppliers at least



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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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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



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Field Monitoring Visits (1/2)

Part of the monitoring strategy of EACEA Agency

- Justification: CBHE Grant Agreement
- Annual Monitoring Plan
- NEO mandate
- National plan communicated to each NEO

Aim of Monitoring visit

- Conducted by NEO
- Check that 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

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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How to manage your project (1/3)

Be aware of your role in the project

- Read the project application
- Find out what you are supposed to do

Read 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

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 + national rules + 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 at the end of 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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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



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Conclusion

Learn and understand the CBHE rules

Take your place in the consortium

Full partner
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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