Project Management

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Presentation overview

• Erasmus Mundus 2004-2008: Action 4 Results
• Erasmus Mundus 2009-2013: Action 3
• Project Life Cycle/Day to day management
• Reporting (Progress report + Final report)
• Financial Management + Amendments
• Questions and answers
Overview 2004 - 2008

- Total applications: 297
- Total selected projects: 54
- Total budget: 13.36 M€
- Rate of success: 14.21%
Action 4: Projects

2004
LATER IMN
Studies and Promotion
EMNEM
BalticStudyNet
Aquarius
AMEU

2005
PENTA
PEHE EACN
Network ACTIVE
MUNDUS MUSICALIS
GoNorth
EXAMPLE
EDU

2006
VALUE SDPROMO
Forum on Europe:
ENDEAVOUR
CHEMEXPASS
CBP3
BECE
BalticStudyNet
BALANCE

2007
TEA TEAM
LE:NOTRE
ISEKI_MUNDUS
FASTQUAD
ENHSA-LATIN AMERICA
EMIS
EHEW-SISMBG
E4DCs
CPCNASCE
BRIDGES-LAC
ACTIVE ASIA

2008
DOCET
ACCESS
ENHSA-LATIN AMERICA
EMA-4-Moodle
WISHES
European Campus
FORT
LEANES
IP-UniLink
GLEUBE

AHEAD-EU
EACOVIROE
MOVINTER
TwoEA-M
Access to Success
PROMHEDEU-LAC
SDPROMO II
ENATIS
EU-STEP
ISEKI_Mundus 2
Projects targeted towards a specific geographical area

North America
- BALANCE

Baltic Countries
- BalticStudyNet
- CBP3

Barents Region
- IMN
- GoNorth

Caucasus
- PEHE EACN
- FASTQUAD
- WISHES

Europe Central
- BECE

Asia
- ACTIVE ASIA
- TwoEA-M
- EACOVIROE
- LEANES
- ACCESS

Latin America
- NetACTIVE – AIESAD-EADTU
- FORUM ON EUROPE
- VALUE
- ENHSA-LATIN AMERICA
- BRIDGES-LAC
- PROMHEDEU-LAC
- MOVINTER

North Africa
- CPCNASCE
- Access to Success

Euro Mediterranean Area
- FORT
- Tea Team
Projects targeted towards a specific field or promoting European Higher Education in the world

**Engineering/ Technology**
- CHEMEEPASS
- DOCET/EQF-CDIO

**Business**
- IP-Unilink
- ENDEAVOUR

**Music**
- MUNDUS MUSICALIS

**Food studies**
- ISEKI_Food I & II

**Environmental, agriculture studies**
- AMEU
- SDPROMO I & II
- E4DCs

**Bioethics**
- GLEUBE

**Architecture**
- LE:NOTRE
- ENHSA-LATIN AMERICA I & II

**Services**
- EMIS
- ENATIS

**Quality Assurance**
- EMNEM
- AQUARIUS

**Access for Disabled students**
- AHEAD-EU

**Distance Learning**
- EDUContact
- LATER

**Promotion of EHE to the world**
- EXAMPLE
- PENTA
- European Campus
- EU-STEP
- EHEW
- EHEW-SISMBG
- EMA-4-Moodle

**Services**
- EMIS
- ENATIS

**Quality Assurance**
- EMNEM
- AQUARIUS

**Access for Disabled students**
- AHEAD-EU

**Distance Learning**
- EDUContact
- LATER

**Promotion of EHE to the world**
- EXAMPLE
- PENTA
- European Campus
- EU-STEP
- EHEW
- EHEW-SISMBG
- EMA-4-Moodle

**Services**
- EMIS
- ENATIS

**Quality Assurance**
- EMNEM
- AQUARIUS

**Access for Disabled students**
- AHEAD-EU

**Distance Learning**
- EDUContact
- LATER

**Promotion of EHE to the world**
- EXAMPLE
- PENTA
- European Campus
- EU-STEP
- EHEW
- EHEW-SISMBG
- EMA-4-Moodle
Action 4 2008 Selection Round

- Total number of applications assessed: 61 (56 attractiveness projects + 5 Thematic Networks)
- Total number of projects selected: 20 (total budget: 5,52 Million €)
- Success rate: 29% (higher than in previous years, mainly due to higher allocated budget)
Projects selected in 2008

- 7 projects concern services, development of information kits, pedagogical tools, methods improving the accessibility and mobility for third country students
- 7 projects focus on the promotion of specific disciplines
- 3 projects focus on particular geographical regions (Latin America, Africa and Mediterranean countries)
- 1 project related to promoting the Bologna process worldwide
- 2 Erasmus thematic networks combine activities and studies related to the mutual recognition of qualifications with third countries in a particular field
Erasmus Mundus 2009-2013 Action 3: Promotion of European Higher Education

- Attractiveness projects (including internationalisation of Erasmus Thematic Networks (no Call in 2009))
- Grants for promotion of Erasmus Mundus for National Structures (restricted Calls)
- Studies, Calls for Tender (e.g. quality assessment of Masters Courses, Cluster meetings)
- Support to the EM Alumni Association
Project life cycle

Application procedure

Dissemination, exploitation and sustainability

Project results

Project management and further development
Day to day management

• We work together for a common goal: making all selected projects a success

• We are at your disposal to help you in finding solutions

• The information on the project management should be shared between the consortium and the Agency

• All the changes, successful experiences and difficulties should be communicated on a regular basis
Monitoring visits

- The **monitoring visits** may be performed in one or more of the following ways:
  - visit by Agency representative(s) to the premises of the coordinator (in situ visit)
  - visit by Agency representative(s) to a project event or partnership meeting

- In addition the Agency participates occasionally in kick off meetings of new projects
# Project life cycle and events

<table>
<thead>
<tr>
<th>Financial events</th>
<th>Administrative events</th>
<th>Management events</th>
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</thead>
<tbody>
<tr>
<td>First pre-financing (40% or 80%)</td>
<td></td>
<td>Financial management &amp; Audits</td>
</tr>
<tr>
<td>Second pre-financing (40%)</td>
<td>Progress Report</td>
<td>Amendments</td>
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<tr>
<td>Final payment (20%)</td>
<td>Final Report</td>
<td>Day to day management</td>
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<tr>
<td></td>
<td></td>
<td>Monitoring visits</td>
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</tbody>
</table>

- **Administrative events**
  - Start
  - End

- **Management events**
  - Progress Report
  - Final Report
  - Financial management & Audits
  - Amendments
  - Day to day management
  - Monitoring visits
**Progress Report**  
*(projects > 1 year)*

- **Submission deadline** cannot be changed!!
- Technical part: description of project activities, products and results
- Financial part: Financial statement for the period concerned
- Second pre-financing payment IF 70% of first pre-financing used
  
  **IF NOT:**
  - only acceptance of technical part
  - submission of pre-financing request once 70% of first pre-financing payment spent

N.B.: Agency will send a reminder 2 weeks before the submission date
Final Report

- **Technical part:**
  - detailed picture of work completed during the eligibility period
  - sustainability strategy
  - products & results

- **Financial Part:**
  - Financial statement covering the full the eligibility period (including declaration of interests gained on pre-financing payments)
  - Obligatory use of final report excel table
## Final Report Excel Table

- Replaces the list of invoices
- Applicable to all projects
- Will be published on the Website
- Will be sent to the projects closing shortly

### Requirements
- Fill in all the cells
  (write down all the invoices and supporting documents)
- Submission in electronic and paper format

### Recommendation
- To be filled in when an event occurs
Final Grant Calculation

- Agency checks the eligibility of costs

- No Profit rule:
  - Never above initial grant amount
  - Contribution to actual eligible costs limited to the co-financing percentage of the in grant agreement
  - Not above declared expenditure minus declared income
Eligible expenditure

- Reasonable & justified (Invoices or equivalent accounting documents)
- Actually incurred
- No profit
- Each item in only 1 heading
- Project related & necessary
- Occurred in the eligibility period
- In accordance with the rules/law (tax and social legislation + Handbook and the Grant Agreement)
- Comply with sound financial management in particular regarding economy and efficiency
Staff costs

Categories:
1. max. 450€
2. max. 300€
3. max. 250€
4. max. 125€

- Changes in the allocation of staff costs should be notified to the Agency (the Agency can reject it)
Travel Costs

- The most economic fares must be used
- Travel costs are based on the actual costs incurred
- Normal travel insurance costs are also eligible
- Several travel agencies should be contacted in order to obtain the best possible prices
Accommodation & Subsistence

- Must be indispensable and reasonable taking into consideration the place of stay
- Must be calculated in accordance with the internal regulations of the institution of the person making the journey
- Must not exceed the maximum amounts per person per day as indicated in the financial handbook
Equipment & Materials (purchase, leasing rental)

- Strictly necessary for the performance of the project
- Least expensive method
- Included installation, maintenance and insurance
Subcontracting, consultancy and other external services

- Fully described in application
- Only if necessary for the performance of the project
- Not above 30% of total eligible costs
- Least expensive method (purchase, leasing or rental)
- Included installation, maintenance and insurance
- No basic activities of the project
- Tendering documents, agreements, offers, invoices, bank statements must be provided to EACEA (<5.000: single offer 5.000-25.000: 3 offers, >25.000: 5 offers). Transparency and equal treatment + No conflict of interests
Other costs categories

Conferences & Seminars
- all expenditure relating to conferences and seminars
  (including travel and subsistence for conference & seminars)

Other direct costs
- only if necessary, documented and if not in an other category
  (ex. bank charges opening account, internet communication)

General costs:
- max. 7% of total eligible costs

NO VAT/taxes
- national rules, only eligible if not recoverable
Ineligible expenditure

• Before or after period of eligibility
• Related to other project
• Contributions in kind (unless accepted in the agreement)
• Debts & charges
• Provisions (losses, liquidations, winding up, contractual obligations)
• Interests paid
• Exchange losses
• VAT (if recoverable)
• Fines, penalties
• External co-financing for real estate
• Excessive expenses
Amendments

• Official amendment
• Formal approval by EACEA
• Notification
| 1. Budget changes exceeding 10% of a budget heading of the approved budget |
| 2. Eligibility period |
| 3. Coordinating institution |
| 4. Major changes in the work plan |
| 5. Partnership composition (except for Thematic Network) |
| Request submitted at good time before it is due to take effect and at least 60 days before the end of eligibility period detailed in the agreement, signed in original by the Legal representative (accompanied by official documents) |
| Double signature by the Agency and the Legal representative is required |

**Amendments**

**Official Amendment**
# Amendments

*Formal approval*

| 1. Change of legal representative  | 1-2 Request signed in original by the legal representative accompanied by official documents |
| 2. Coordinator                   | 3 – 6 Request signed by coordinator submitted at good time and at least 60 days before the end of eligibility period accompanied by the necessary documents. |
| 3. Banking information           | Exchange of letters (1, 2, 3, 5, 6) or exchange of letters or another form of exchange of written information (e.g. fax or e-mail) (4) |
| 4. Deadline for submission of Final report |
| 5. Minor changes in work plan    |
| 6. Erasmus Thematic Networks: change of partnership composition |
Amendments

**Notification**

| 1. Budget changes remaining within 10% of each budget heading of the approved budget | The Agency can reject the changes in writing after receipt of the notification |
| 2. All other modifications not requiring a formal approval or an amendment | |

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Audit

• Within project lifetime until 5 years after the last payment
• Can be carried out at any time
• Full access to all information needed by auditor
Supporting documents

- Must be kept until 5 years after the last payment
- Beneficiary: originals & dated
- Partners: certified copies & originals available for consultation
- No pro-forma invoices
- Bank documents, accounting records, analytical accounts & annual statements available
Acceptable supporting documents

**Staff costs:**
- Timesheets
- Salary slips
- Bank statements
- Employment contracts

**Travel:**
- Original tickets (train)
- Original tickets or boarding passes
- Copy invoice (air)
- Receipts & expense forms
- Original Invoices (car hire)

**Subsistence:**
- Internal rules of your institution OR Maxima EACEA (Financial Handbook)

**Equipment & Materials:**
- Invoices and depreciation tables
- Lease, rental agreements

**Subcontracting:**
- Invoices
  (Including relevant travel)
- Agreements
- Tendering documents

**Other costs:**
- Invoices

Sound financial management & Good management organisation
Thank you for your attention

Remember:
the Agency is your partner
please contact us in case of doubts and questions