Tempus

Project Management Handbook

Tacis

A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (http://europa.eu.int).

Cataloguing data can be found at the end of this publication.

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The European Training Foundation, which is an agency of the European Union, was established to support and co-ordinate activities between the EU and Partner States in Central and Eastern Europe and Central Asia in the field of vocational education and training, and assists the European Commission in the implementation of the Tempus Scheme.

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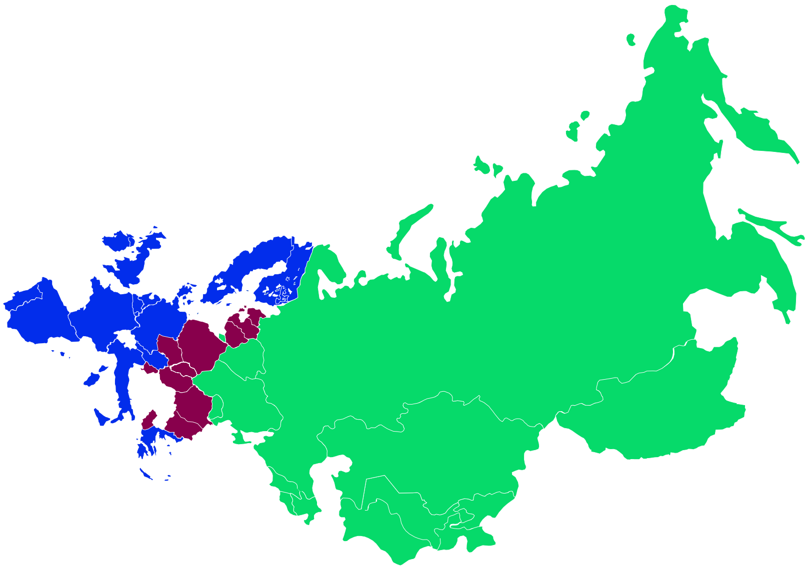
WHAT IS TEMPUS TACIS ?

Tempus (Trans European cooperation scheme for higher education) was adopted by the Council of Ministers of the European Union on 7 May 1990[1] and extended on 29 April 1993 for a second 4-year phase commencing with the academic year 1994/95 (Tempus II).

Tempus Tacis is a European Union (EU) programme designed to stimulate cooperation with the New Independent States and Mongolia (the Partner States) in the restructuring of their higher education systems. It forms part of the Tacis Programme, the overall EU initiative which fosters the development of harmonious and prosperous economic and political links between the European Union and these Partner States. In 1996 a total of 13 Partner States took part in Tempus Tacis.



1 Cf. Council Decision N° 90/233/EEC of 7 May 1990, OJ N° L131/21 and the Council Decision N° 93/246/EEC of 29 April 1993, OJ N° 112/34

In the period 1993 to 1995 the European Union has invested a total of 48.19 MECU in restructuring higher education in the New Independent States and Mongolia through Tempus Tacis, by supporting 237 one-year Pre-Joint European Projects, and 59 three-year, full-scale Joint European Projects. Funding is provided through Tacis Action Programmes negotiated with the Partner States.

Tempus Tacis supports high quality projects which will restructure and develop curricula and teaching materials, up-grade teaching facilities, and/or improve university administration in higher education institutions in the Partner States. In order to adapt to the specific framework conditions for cooperation in the Partner States and to ensure the effectiveness of Tempus Tacis projects, a two-phase project cycle has been adapted. Projects are developed during a preliminary period of contact building and mobility, carried out in the framework of preparatory projects (Pre-JEPs). Joint European Project (JEPs) grants are awarded to the most successful Pre-JEPs after the completion of this preparatory phase. Joint European Projects focus on structural changes with the aim of creating centres disseminating good practice to other institutes in the respective regions. As a supplementary action in 1996, the new Compact Project has been developed. Compact Projects focus on university administration or the improvement of relations between universities and other parties in the international community, the national educational system and local economic and social fields.

Tempus Tacis is a “bottom-up” programme responsive to the specific needs of individual institutions and Partner States. Projects are formulated by universities in the New Independent States and Mongolia in cooperation with their partners from the European Union, where the EU universities supply their know-how and experience.

Tempus Tacis projects are selected annually through open competitions, with the help of independent academic experts to ensure objectivity.

Tempus Tacis is administered by the European Commission (Directorate General XXII - Education, Training and Youth) with the technical assistance of the European Training Foundation located in Turin. National Tempus Information Points established by the authorities of each Partner State assist in providing information about the programme.

1. THE PURPOSE OF THIS HANDBOOK

This handbook is designed to help coordinators of Joint European Projects (JEPs) and Compact Projects (CPs) to manage their programmes The difference between the success and failure of a project involving international cooperation often depends on the quality of its management. It may also provide some useful hints for Pre-JEP Coordinators. We aim it particularly at those who are about to start their first JEP or Compact Project and the handbook reflects the experience of several project coordinators and of the staff of the European Training Foundation. We hope it is practical enough to help project coordinators solve everyday problems.

2. SUPPORTING DOCUMENTS

This handbook is not a part of your project contract. It should be treated as complementary to the documents distributed when funding for a project is awarded. These are:

a) The project Contract including the Guidelines for the Utilisation of the Grant.

b) Your own Project Application and Revised Budget and Activity Plan (RBAP, only for JEPs).

These documents are described in detail below.

3. INTRODUCTION: THE TEMPUS TACIS PROGRAMME

3.1. Pre-Joint European Projects (Pre-JEPs)

In order to adapt to the specific framework conditions for cooperation with higher education institutions in the Russian Federation, a two-phase cycle (Pre-JEPs and JEPs) has been adopted.

Pre-JEPs are intended for preliminary contacts/mobility activities and are a compulsory first step towards the preparation of Joint European Projects. Pre-JEP activities are organised within the framework of stable consortia of higher education institutions in at least 2 different European Union Member States and one higher education institution from the Partner State. In addition, consortia may include one higher education institution located in a non-EU G24 country. However, funds awarded through the EU cannot be used for the benefit of participating institutions from these countries.

While implementing Pre-JEP activities, it is important to consider several points:

1. It is essential to study carefully local conditions, in which the Partner State institute is operating. Note that conditions will vary not only from country to country, but also from city to city. For example, a number of Russian higher education institutions are located in remote areas or in those cities, which have been "closed" and just recently opened for contacts with Western Europe. Sometimes for them a Tempus pre-project means the start of cooperation with universities from the EU Member States.
2. Pre-Joint European Project activities should be focused on building a team of dedicated people which can efficiently work in the following Joint European Project, as the JEP grant will only be awarded to the same consortium of institutions as the Pre-JEP's.
3. The introduction of the institutional and needs analysis in the 1996 Guide for Applicants means that consortia analyse and interpret the beneficiary institution's current situation *vis-à-vis* national government educational policies and social, economic and labour conditions. The analysis should clearly identify the specific needs in the particular Pre-JEP's subject area and the related reform and training needs.

4. It is important to be “open” about the project, disseminating information on the project to other departments/faculties of the partner institution and other higher education institutions in the region. In order to enable smooth running of the pre-project, it is advisable to establish contacts with the authorities of the partner institution early in the project, explaining the benefits of the project to their institution and keeping them informed of the project activities.
5. From the very start of a project it is important to ascertain which other Tempus projects are running in the same region. Attempts should be made to establish links with other Pre-JEP’s and running JEP projects, irrespective of the subject area, as existing projects will most certainly be capable of providing invaluable advice concerning solutions to everyday practical management issues (transfer of money, purchase of equipment etc.)

3.2. Compact Projects (CPs)

In 1996 a new feature of the Tempus Tacis Programme is the introduction of the Compact Project (CP) which targets precisely defined short-term needs in pre-determined priority areas. The CP is a self-contained, stand-alone project which addresses one single objective to be achieved by the end of a maximum project duration of 18 months.

Compact Project funding is awarded to consortia which already have sound experience of project collaboration with the NIS and Mongolia and have demonstrated a thorough knowledge of the local context and its implications.

A unique feature of Compact Projects is that they may involve additional non-consortium institutions in the European Union or the Partner State in their activities.

Compact Projects focus on university administration or the improvement of relations between universities and other parties in the international community, the national educational system, and local economic and social fields.

3.3. Joint European Projects (JEPs)

Upon the completion of the preparatory one-year phase full scale project grants (Joint European Project grants) are awarded to the most successful Pre-JEP consortia.

The JEP is a main module of the Tempus Tacis Programme. Only higher education institutions from EU Member States can be project coordinator/contractor. Financial support for JEPs is only awarded to consortia of the same partner institutions as for Pre-JEP grants.

Institutional development is the central feature of the JEP. Projects focus on the restructuring and development of curricula and teaching facilities or the review and improvement of university administration. Within these objectives, a broad range of cooperation activities are being supported, such as:

- the development of new courses, teaching programmes and syllabi;
- the development of new teaching materials and textbooks;
- the introduction of new administrative methods;
- the (re-)training of teachers/trainers and administrative staff;
- the upgrading of technical facilities;
- the development of new departments and institutions;
- university-industry cooperation.

3.4. Project philosophy

The goal. The Tacis Programme is a European Union initiative aimed at helping the New Independent States achieve the transition from centrally planned to market economies. It provides support in the form of grant finance to foster the exchange of knowledge and expertise through partnerships, links, and networks at all levels of society.

Tempus is a programme designed to assist the New Independent States in restructuring their higher education systems. In addition to this, Tempus has stressed, from the outset, the higher education sector's crucial importance for the political, social and economic reform process at large. The impact of Tempus can be measured in the extent to which universities contribute to the development and consolidation of new democratic, pluralistic and economic structures currently being established in the NIS and Mongolia. The Programme promotes the exchange of ideas and values which is a crucial element in creating an open society and a prerequisite for sustaining reforms.

The effectiveness of the Tempus programme will, to a great extent, depend on how well project results fit into the long term objectives of the respective countries' educational systems. At the institutional level, projects are only of value if they fit into the development strategies of the participating institutions.

Tempus projects are goal-oriented projects. The objective of the project is defined in the contract. It is essential that all aspects of the project (project activities) form a cohesive entity designed to achieve this objective. You receive the grant to achieve <u>your specific goal</u> and <u>not</u> just to implement a particular activity, such as staff exchange.

Goal-oriented management requires both leadership and flexibility. The priority of the project coordinator is to achieve the project objective. The art and challenge of project management is to use the awarded sum of money to the greatest possible advantage. The contractor and coordinator of the project have substantial authority to modify activities in relation to the original plan. It is better to modify or abandon an activity which is clearly not producing results, than to rigidly adhere to the original plan. The coordinator needs to keep the project team focused on achieving the final goal.

3.5. Project activities - Achieving the goal

A project normally consists of several smaller ‘projects’ (activities). Activities are your tools to achieve the goal. The Project Management Group should be constantly asking the question whether each of the ongoing activities is helping to achieve the overall goal of the programme. If the answer for any activity is “no” you are wasting your time and money and should consider modifying or terminating the activity in question. The most common activities are listed below.

Project activities	
1	Undergraduate and postgraduate curriculum development including preparation of teaching materials.
2	Mobility of staff and students.
3	Development of new management structures within the higher education systems.
4	Upgrading of facilities/purchase of new equipment.
5	Development of teaching materials.
6	Organisation of intensive courses.
7	Development of university-industry relations.
8	Creation and restructuring of higher education centres.

4. THE PROJECT TEAM

It is impossible to run a successful project without team support. It is essential for the coordinator to ensure that a team of individuals is available at each partner institution. Confirm your list of participants with the project leader of each institution at the beginning of the project. Make sure that the Project Management Group assigns everybody some responsibility soon after commencement of the project. Do not allow your team to disappear through inactivity. During your visits to partner institutions, make an effort to personally meet as many participants as possible.

4.1. Team building

Your team is your most important asset. Team building is essential for the project coordinator. Inevitably, every project relies on a small number of key players. Select your key team members carefully and cultivate them. Recognise achievements. Individuals work better if you give them real responsibility. Delegate to your key players as much executive responsibility as possible. Make sure your team members receive appropriate credit for what they achieve at their institutions.

Always seek new members for the core team: spot new talent. Make sure that people who need to collaborate closely meet early: it is much easier to communicate by fax or E-mail once individuals have already met personally. To ensure the long-term effectiveness of the project in Partner States universities, it is important to gradually shift the executive responsibility for the project towards the Partner State institution. The involvement of local academics should steadily increase throughout the project so that, at the end of the funding period, all activities can continue.

Since problems may occur if a key person in a partner institution changes position or leaves during the project, it is important to designate deputies for key team members.

4.2. Involvement of all the partners - Image of the project

Involvement of all the partners in the project is essential. The impact of your programme will be greater, and its assessment better, if there is a balanced participation from all partner institutions. Make clear to the partners that participation in the programme is an individual as well as institutional commitment: the individuals involved represent the institution. If their personal or professional circumstances change and make their participation in the project difficult, the institution should designate other individuals to continue the project. Part of the team building is to develop the identity and image of the project. Development of the project identity increases the cohesion of the group and creates “ownership” of the project. Define functions for individuals (e.g. Project Leader, Deputy Project Leader) and make these functions formal so that they can include these in their curriculum vitae. Project folders, newsletters and stationery are not expensive and help to build project image. Print visiting cards for key individuals to facilitate contacts at conferences etc.

Partner State university staff members trained in EU institutions, and EU university staff who gain teaching experience in NIS and Mongolia can, by acquiring working experience in both systems, become the most valuable members of the project team. Use this expertise. It is a good idea to assign such individuals key positions within the project as soon as possible. Nothing guarantees the project's success more than a critical mass of individuals familiar with both Partner States and EU.

5. MAKING YOUR PROJECT PART OF THE TARGET INSTITUTION (INSTITUTIONAL EMBEDDING)

Projects aim to create substantial change at target institutions. This can only be achieved if members of the project team have sufficient local power or influence to effect the change, and if they can generate enough support to implement it. Make sure that you are aware of the level of seniority of your partners, and of their exact position within their own institutions. If you think the position of any of the partners is too weak to influence the department/faculty, seek their advice as to how the support of a more influential individual(s) or body may be obtained. This is valid for both Partner States and EU institutions.

The effectiveness of training programmes in the EU will also depend on whether the project is regarded locally as a mainline departmental/institutional activity. The bigger the project, the more support you will need from the host institution.

It is essential that the target university regards project activities as "its own". Ensuring this is one of the most important tasks of the project coordinator. The Project Management Group needs to be in touch with the appropriate university/faculty authorities to ensure that any project fits into the medium- and long-term university strategy and is incorporated into university development plans. Avoid at all costs the project being seen as a private activity of a small group of individuals. Meet regularly with university officials to review the status of the project.

The authorities in partner institutions need to be aware of the resource demand of project management. Talk to relevant heads of departments. At an early stage of the programme, discuss the project at faculty level and at university level if appropriate. Such discussions not only establish lines of communication but also pave the way to asking for assistance if required later. Always talk with senior members of the relevant departments, other than those directly involved in the project. Remember, lack of communication is a common problem in both Partner States and EU institutions. If there is no solid institutional support or individual interest in the project, all activities will stop soon after project funding finishes.

Maximise your project's impact on the institution as a whole. Demonstrate the project's usefulness to the department/faculty. Inform relevant authorities of activities such as language courses, seminars, etc. in which individuals from different departments can participate. Make sure that the project team has links with, and access to, existing information services at the university such as newsletters etc.

Since by definition, a Tempus project involves international collaboration, its results will contribute to the international image of all participating institutions.

6. HELP AVAILABLE TO THE PROJECT MANAGEMENT TEAM

It is essential for the coordinator to develop working relationships with the following:

6.1. University International Offices

University International Offices at partner institutions. The staff of these units are familiar with running international programmes, the logistics of staff exchange etc. and may be able to give invaluable assistance to project coordinators.

6.2. University Finance Office

The expertise of a well run University Finance Office is invaluable to the project. Please note that handling foreign transfers and multi-currency accounting are still relatively new in some institutions.

6.3. Tempus Information Points in the New Independent States and Mongolia

Contacts with these are important for project coordinators and contact persons in the Partner States.

The Tempus Information Points have all been set up to assist in the smooth running of projects in the NIS and Mongolia and can be of assistance to project coordinators/partners by:

1. providing information on the overall situation and development of higher education sector in Partner States, as well as the information on a particular higher education institution in the Partner State;
2. supplying information on all ongoing Tempus projects and putting you in touch with participants in other Tempus projects;
3. providing information on visa requirements. For example, the Tempus Information Unit in Moscow has reached an agreement with the German and Spanish Embassies on a simplified visa procedure, which allows the Russian Federation mobility participants to receive their visas in the course of 2-4 working days;
4. assisting with the tax exemption for equipment imported into the Partners States within the framework of the project through the Tacis Coordinating Units. The procedure currently used for tax exemption is used for all Tacis projects. The local recipient of equipment (example: a Russian Federation higher education institution) has to submit to the local Tempus Information Unit (Moscow) two copies of the attestation (in Russian and in English) requesting tax exemption,

attaching a customs waybill or an invoice (a sample of the attestation from the local recipient is attached, Annex 1a is a Russian version). After that the EU Delegation in Moscow and the EU Tacis Coordinating Unit attach their attestations and the documents are submitted to the Central Customs Committee of the Russian Federation. At the moment the procedure is rather lengthy and can last up to one month, as the Customs Committee does not grant tax exemption automatically, but examines each case separately. Therefore, it is advisable to start the procedure before the equipment has actually reached the border point.

6.4. European Training Foundation, Tempus Department

Each project has an assigned Programme Manager. Programme Managers are experienced in project monitoring and are experts in contractual matters. Contact your Programme Manager whenever you have difficulty with interpretation of any part of the contract or if you need help or advice on your project. Guidelines for the Utilisation of the Grant list a number of circumstances when you must obtain authorisation from your Programme Manager before action is taken. Please note that post factum authorisation is not granted. Any partner is welcome to contact the Tempus Department but one should remember that financial decisions are the responsibility of the institution which holds the Tempus project contract (contractor). It simplifies matters if communications with the European Training Foundation which would have financial implications, are channelled through the contractor.

Please note that the European Training Foundation cannot interfere in disputes between partners. These need to be resolved within the project consortium.

7. DIFFERENCES BETWEEN PARTNERS - CONFLICT MANAGEMENT

Project partners have different cultural backgrounds, speak different languages, use different working methods, employ different forms of communication and have different approaches to problem solving, accounting and management. Customs and sensitivities may differ between partner institutions. The challenge is to turn these differences into a programme asset, and to maximally exploit the strong points of all partners. The differences should be openly discussed. It is essential that partners are prepared to listen to, and learn from, each other. Be aware of the danger of misinformation and of misunderstanding particularly if the partners have only a superficial knowledge of each others' cultural background. To give an example, native English speakers often speak too fast or use too many colloquial expressions. On the other hand, a non-native English speaker may sound rude due to a choice of words or an accent. There is sometimes a degree of defensiveness in Partner States institutions and open criticism is often not well received. A patronising attitude from the Western academics arising from lack of knowledge of Partner State university tradition and history may prove infuriating. The coordinator should be prepared to play the role of a mediator when problems arise.

A common misconception and a potential source of problems is the idea that benefits of any project should be restricted to Partner State institutions only. Although this may be true in a strictly financial sense, it needs to be remembered that a Tempus project is a programme of collaboration between individual academics and institutions. It is not a one-sided assistance or a charity-type aid programme. To be effective, collaboration should be beneficial to all partners concerned. The task of the Project Management Group is to maximise benefits for all project participants. To attract leading individuals, participation in the project needs to be made attractive from an academic point of view. A project normally benefits Partner States institutions through improvements to the infrastructure and retraining of staff. EU partners gain consulting/teaching experience. Participating academics on both sides could be formally awarded academic credits such as Visiting Lectureships/Professorships, memberships of societies etc. The coordinator should explore these possibilities with partner universities. Remember: every participating individual in EU and Partner States institutions will be devoting his/her time, which would otherwise be spent on other academic tasks. If the participants feel that the time spent on project activities is academically wasted, you are unlikely to get much cooperation from high-calibre individuals.

It is important to realise that the political and economic situation in the Partner States is changing quickly and local universities are being restructured. There are budgetary problems and uncertainties. Project partners may be confronted with the effects of high inflation or unexpected delays caused by new legislation. The best possible knowledge of the local situation is essential. Problems may also arise if there is no strategic vision of future development of the target university, or no understanding of the Tempus project philosophy or mechanisms of EU funding. This is particularly important when multiple financial needs exist at the target university. It needs to be made clear from the outset that:

a) Project funds are there to be spent exclusively for a programme as outlined in the original application and modified in the Revised Budget and Activity Plan (RBAP, see below). They cannot be spent on other areas even if these are in need of funding.

b) The project consortium, not the target institution as a whole, is the recipient of the grant. The project contractor has the final say on spending.

c) Project funding is awarded for improvement of the Partner States higher education system through collaboration with EU institutions. Thus, part of the project grant will be spent directly at Partner States institutions, while another part will fund collaborative activities. The grant cannot be spent on equipment alone.

Any project will to some extent affect the policy of target institutions. Projects which aim at structural reform will always meet a degree of reluctance to change. In extreme cases the project could be interpreted as an intervention of EU academics in the internal policy of the target institution. Discuss this early in the project: anticipate the effect and make sure there is a critical mass of committed academics on site to support the project ideas.

Handling conflicts. Conflict is a normal aspect of human interaction and can be used creatively to explore new ideas and approaches. It is almost inevitable that, at some point, problems will arise between the participating centres and individuals. Clearly stated objectives, good communication and anticipation of problems will help to avoid difficulties. It is useful to discuss all of the above at the beginning of the project and to agree within the Project Management Group on how any conflicts will be handled and who will have the final say in difficult cases.

Problem handling checklist	
1	Anticipate problems. They will occur.
2	Do not lose your temper. The coordinator is there to keep things together.
3	Talk the problem through. Never walk away from an unsolved problem.
4	Differentiate between personal and professional. You are not there to make anyone else a better person. Both of you are there to help make the project a success.
5	Always ask the question: is this a real problem or whether the problem is a result of different backgrounds ?
6	Remember: most problems occur as a result of inadequate communication.
7	If you need to be critical of somebody with a different cultural background, it is best to take local advice before you act.
8	Negotiate and compromise where possible. The art of negotiation is to solve the problem and not to show the other participant that he/she is necessarily wrong.
9	Learn from conflicts. Help others learn from them.

8. PROJECT MANAGEMENT

8.1. Management structure of the project

Projects involve a lot of money, a large number of people and have a strictly limited duration. Programmes of this type require an efficient management structure. Part of the structure is defined by the contract but a large part needs to be developed by the participants. Previous experience indicates, not surprisingly, that well managed projects are more effective.

8.2. Contractor

In the Tempus Tacis programme the same EU institution acts both as contractor and coordinator. However, in many cases the contractor and the coordinator are not the same person, therefore it is essential to define the responsibilities of each at the start of the programme. The contractor is legally and financially responsible for the money received. The institution can nominate a contact person for the actual management of the project. The contractor and coordinator should define the decision making process. Usually the contractor controls the money and the coordinator directs academic activities. If the project is a failure, the coordinator's reputation might suffer, but it is the contractor who will actually pay for the mistakes.

Responsibilities of the contractor are:

a) To administer the project grant.

b) To draw the attention of all partners to contractual rules and to release money only for the purposes allowed by contract.

c) To submit required reports to the European Training Foundation in cooperation with the coordinator.

8.3. Coordinator

The project coordinator is a key individual in the project. The coordinator's role needs to be clearly defined and agreed at the outset of the project. It is probably best if the coordinator becomes a managing director of the project. As the coordinator also represents the contractor, the final responsibility for the utilisation of funds is also his/hers. Responsibilities of the coordinator are to manage, coordinate and monitor the project activities and with regard to timetable, assess achievement of the planned endpoints and coordinate appropriate records of activities. As mentioned above, the coordinator needs to actively cooperate with the contractor in the preparation of project reports.

Main coordinator challenges	
1	Adapt to local conditions.
2	Ensure institutional embedding.
3	Treat each activity in a strategic manner: ensure its long-term sustainability.

8.4. Project Management Group

The coordinator and the contractor cannot run the project alone. The Project Management Group plays the role of the project Board of Directors. This group should be formed as early as possible and should include individuals responsible for the project within each participating country and possibly within each participating institution.

Members of the Project Management Group should be formally appointed. The coordinator should ensure that heads of departments/deans, if appropriate, are notified of this appointment so that the individuals concerned can receive formal recognition.

Project management is time consuming. Always discuss the time commitment required with a prospective member of the Project Management Group before appointment. If you wish to appoint a busy senior academic, ask for the designation of a deputy whom the Team could turn to in his/her absence. Avoid appointing people who will be unable to devote enough time.

8.5. Support staff - Project administrator/secretary

Project administration is also time consuming and can adversely affect the coordinator's other academic activities. A project administrator/secretary can take a lot of the administrative burden from the academic staff and provide both continuity and a contact point for communication. While one needs to avoid excessive administrative expenses, inadequate support staff adversely affects the project.

Excessive savings on administrative staff can be counter-productive.

At the beginning of the project:

1. Assess the realistic needs for secretarial/administrative support in all participating centres. Usually, the coordinator's office would need the highest grade of support staff.
2. Consider including the following tasks in the administrator's job description:
   a) secretarial support
   b) transfer of funds and accounting
   c) organisation of meetings
   d) travel arrangements
   e) organisation and planning of visitors'/trainees' stay (accommodation, insurance etc.).
3. The project administrator/secretary needs to have fairly diverse skills such as handling international communications, working in a multilingual environment and possibly handling accounts in different currencies. Prepare a job description and interview any applicants to ensure that they will be able to cope with the job.

   You may choose to employ a part time administrator and a part-time secretary.

8.6. Training of administrative staff

Consider training key member(s) of the project's administrative personnel from Partner States institutions for a short period in the coordinator's office to familiarise them with office procedures and also to establish informal links between administrative staff.

Issues in project management	
1	Clear management structure and decision making.
2	Clear definition and distribution of tasks and responsibilities.
3	Availability of named contact persons in every partner institution.
4	Defined communication pathways and contact points.
5	Agreed rules for budget management.

9. DOCUMENTS SUPPORTING PROJECT MANAGEMENT

9.1. The project Contract

This is the document which tells you what you can and cannot do. It also defines the financial responsibility of the institution which signs the Tempus project contract (contractor). READ EVERY WORD OF IT. The contractor is required to distribute copies of the contract to the partners. Ask the partners to read it from cover to cover and review it with key individuals from each of the participating institutions. Contact your Tempus Programme Manager if you have difficulties with interpretation of any part of the contract. Consult the contract before major financial decisions. Remember: reference to the contract may save many lengthy disputes.

The contract includes the Guidelines for the Utilisation of the Grant which contain detailed information on how the money can be used and which types of expenditure are excluded. Consult the Guidelines during the project. Remember, if money is spent on something not allowable, reimbursement will be requested. Always have the Guidelines available for key project staff and your administrator/secretary.

Contact your Programme Manager if you have difficulties with the interpretation of the Guidelines.

9.2. Your own project application

Your Tempus project contract was awarded on the basis of your Application. Keep the application for reference. After the award of the project grant, the work plan and budget outlined in the application will have to be updated and submitted yearly to the European Training Foundation in a Revised Budget and Activity Plan (see below).

9.3. Revised Budget and Activity Plan (RBAP)

The Revised Budget and Activity Plan is an update and adjustment of your workplan described in the Project Application. It should take account of any changes in the local situation which may have occurred between the time of preparation of the application and award of the grant. If the awarded grant is lower than the sum requested, it will also need to accommodate the budgetary limitations. The RBAP should be your realistic yearly work plan. You are required to prepare a first year RBAP within the first 2 months of the project. Once approved by the European Training Foundation, your application, as modified by the RBAP, becomes part of the contract. These two documents are your main reference for a given project year. At the end of the year your project will be assessed by comparing what you have done with what you had planned. The RBAP should be prepared in consultation with, and agreed by, all project partners. If time allows, it is a good idea to finalise the RBAP at the first meeting of the Project Management Group. Particular attention should be paid to the current needs of the Partner State and to the local situation at the Partner State university. Make sure that all partner institutions have copies of both project application and RBAP. Use both for project review.

9.4. Annual/Final Report and Statement of Expenditure

You are obliged to send these to the European Training Foundation every year by the date stated in your contract. The

Annual Report summarises project activities which have taken place in a given academic year and contains an overview of project finances over the same period of time. These reports are the main assessment tool for the Tempus Department. In addition, they are also a useful reference for the project team and an invaluable record for future publications etc. Remember: if you do not record what the team has achieved, all might be forgotten within 2-3 years. After completion of your project you are required to send a Final Report. Only after the approval of the Final Report by the European Training Foundation should the financial matters be regarded as closed. In addition to the Annual Report, the contractor needs to submit a Commitment Letter to the European Training Foundation in the second and final project year. This confirms the willingness of the contracting institution to continue the project.

9.5. The Output Survey

Together with the Annual/Final Report forms an Output questionnaire will be sent to the Contractor which should be completed and returned with the Final/Annual Report.

The information provided by this questionnaire will be used for the promotion and dissemination of the results of your project through the development of Output Compendia. Data will additionally be used to analyse the tangible achievements of projects and to measure the long term sustainability of projects.

9.6. Miscellaneous documents

In addition to the documents received from the European Training Foundation (contract including Guidelines for the Utilisation of the Grant) and those prepared by the project team before the contract (Project Application) and during consecutive years of the programme (annual RBAP and

Annual Reports), it is most useful to have the following for daily use:

a) Project master sheet with an overall plan of activities, indication of the present status and future deadlines. This will save time during report preparation.

b) Finance master sheet showing the present status of the project expenditure. One should be able to carry out periodical projections of expenditure (monthly or before a major expenditure).

c) The mobility master sheet. This should contain the names of mobility participants, dates of travel and the cumulative total number of weeks of mobility used to enable the overall review of this part of the programme.

To save time on the preparation of annual reports, the project documentation needs to be planned in advance. Go carefully through the contract and report forms enclosed with it and identify data for reporting. Avoid accumulating your notes on loose pieces of paper. Excellent software packages are available for the purpose of project monitoring and accounting. Please remember, the master sheets will only make sense if regularly updated. Updating can be a task of the project administrator/secretary.

Documents you need to submit to the European Training Foundation during the project year	
1	Revised Budget and Activity Plan.
2	Commitment Letter (second and subsequent years).
3	Annual/Final Report and Statement of Expenditure.
4	Individual Grantholder Reports.
5	Convention.

Documents to be kept by the contractor for audit purposes (send these to the European Training Foundation only if specifically requested)	
1	Receipts for all expenditure.
2	Conventions (agreements) for all staff employed within the project.
3	Sub-contracts.
4	Certificates of origin as well as the inventory numbers of the equipment purchased.
5	Travel tickets.

10. THE MANAGEMENT OF PROJECT ACTIVITIES

Every project activity will have the following components:

1. Objective
2. Planning
3. Implementation
4. Monitoring
5. Documenting
6. Reporting
7. Informing.

10.1. Objective

Never start anything without defining an objective: otherwise it is likely to lead nowhere. Make sure that your objective is realistic.

10.2. Planning

Plan the content, budget, timing and outputs of anything you want to do. Assign responsibilities. Always assign a leader who understands and accepts responsibility. Always have a deputy project leader. Put your plan in writing and discuss it within the Project Management Group. FIRST PLAN THEN ACT. Clearly define your outputs (when will you be able to say that the objective has been achieved ?).

Whenever a number of people are recruited to participate in an activity requiring a well defined or long-standing commitment (e.g. preparation of teaching materials), it is useful to obtain written confirmation of the willingness to participate from individuals involved. Any participant in the programme should be aware of the time-scale and deadlines before he or she accepts the task.

10.3. Implementation

It is important to maintain the overall view of all the project activities, and to plan them so that they are all integrated to achieve the overall goal. Modifications to the original plan may become necessary during the project year. Please note that although the timing of the activities during the project year may be changed without approval of the European Training Foundation, certain changes do need to be approved by the European Training Foundation before implementation. Consult the Contract and Guidelines for allowable budgetary changes: there is no need to contact your Programme Manager on minor matters.

To facilitate management, Standard Operational Procedures (SOPs) should be developed and documented for the repetitive activities such as:

a) Transfer of money

b) Payments to mobility participants

c) Purchases of equipment

d) Meetings

e) Reporting and distribution of information.

10.4. Monitoring

It is essential to continuously review the progress of the project.

Medium-term progress could be controlled by a Steering Group which would meet at e.g. six monthly intervals.

Short-term planning and review, however, has to continue between the Steering Group meetings. Regular contact between the project coordinator and the leaders of different project activities need to be maintained.

It is important that the coordinator carries out a monitoring visit to the participating centres and to the Partner State institution involved, at least once a year. Such a visit should be carefully planned and individuals whom the coordinator needs to meet should be notified in advance. A review of the project should be carried out with both local coordinators and relevant heads of departments. It is valuable for the coordinator to meet with university authorities on this occasion.

ETF Desk Monitoring

The European Training Foundation monitors projects through the assessment of the Revised Budget and Activity Plan (RBAP), Annual/Final Report and the Statement of Expenditure and also through visits.

On Site Monitoring

Each project will be visited at least once in its lifetime by the Tacis Monitoring and Evaluation Team. As a result of this visit, a Monitoring Report will be produced which clearly defines recommendations for improvement where necessary. These recommendations are contractually binding and the Contractor must thus make every effort to implement them and may be asked to submit subsequent progress reports or other documentation to the ETF Prior to such a visit the Contractor may be contacted by the ETF and asked to provide certain details in advance for use by the monitors. The objective of these monitoring visits is to identify problems at an early stage for all consortium partners and to provide suggestions for improvement.

10.5. Documenting

Document daily activities. It is good practice to make a note of every completed activity such as an intensive course, monitoring visit etc. The coordinator should make a short note of key telephone conversations with project participants and decisions taken. Your decisions will have financial consequences: a record of these helps to avoid misunderstandings and problems later.

A record (minutes) of Project Management Group meetings should be kept, and these should be sent to all the participants for approval/comments as soon as possible after the meeting. Every individual appointed to a task within the project should be asked to write a short (no more than one page) report on his/her activities. Similarly, all visits should be summarised on completion.

It is a useful procedure for the coordinator to send, periodically, short summaries of project progress to the relevant administrative authorities in the participating institutions, particularly to the heads of departments involved. These should be objective reports containing both praise and criticisms. Please remember that an over optimistic report achieves little in the long-term. The most important duty of the project coordinator is to ensure that the project endpoints are achieved.

10.6. Reporting

Forms required for the Annual/Final report are included with your contract package. Reports may be submitted in English/ French/German only. Read them carefully at the beginning of the project to familiarise yourself with what will be required for the assessment of the project. Reporting need not be a time consuming process if the activities are properly recorded throughout the project. On the other hand, inefficient recording of progress wastes a lot of the coordinator's time at the end of the project year. The Project Management Group should have a clear policy that, throughout the project, all partners will send the coordinator a short report on each activity immediately after its completion and a fuller progress report at the end of the project year. Such short reports should include basic data on the activity, participants, outcomes, and expenditure. Distribution of a questionnaire at the end of the project year can help in the preparation of the report. The Contractor needs to send the project report to the European Training Foundation annually.

Main points of project assessment	
1	Has the project objective been reached ?
2	Have the project activities formed a coherent entity leading towards achievement of the objective ?
3	Has the money been spent according to contractual rules ?

10.7. Informing

Communication and a clear decision making process are essential for the running of any organisation. They become even more important (and admittedly more difficult) when geographical distance and multinational teams are involved. Most of the problems in any project result from either inadequacy of communication or from what is aptly called "mushroom management style" (keep them in the dark and feed them rubbish).

The importance of regular communication is obvious. The coordinator and the Project Management Group must remain in regular contact. Regular telephone calls at a set time are an effective way of monitoring the project.

A project participants list or database needs to be available at each partner institution and should include phone, fax and

E-mail numbers. Key individuals should designate deputies. Holiday schedules should be exchanged.

Cost of communication. Overhead costs of the project provide for costs of communication. Make sure that each partner institution has funds to support unrestricted communication. The high cost of communication is a myth. What you will spend on phone and fax bills is a small proportion of your grant money. These costs are an essential part of the project. The cost of ineffective communication is usually much higher than either fax or telephone bills. Make sure this is clear to all partners and to administrators who grumble about your phone or fax usage. DO NOT SAVE ON COMMUNICATION.

10.7.1. Internal communication: informing your own team

- Answering letters, faxes and returning telephone calls. It is essential that all the project participants agree that every communication will be replied to as soon as possible. A lack of response to correspondence can seriously delay your project. If your answer needs time, fax a short note informing of the delay.
- Distribution of information within the team. Never forget to distribute new information regularly to all key personnel. It should be a task of the project administrator to ensure that information is always disseminated to all individuals who might need it.
- Project meetings. Meetings are the best opportunities for disseminating information and resolving difficulties and conflicts. Non-structured meetings are often a waste of time. Prepare an agenda (points to discuss) for each meeting and distribute it in advance making sure to give individuals adequate warning of meeting dates. A reply form sent with an invitation helps to arrange hotels, catering etc. The following are recommended during the project year:
- Planning meetings at the beginning of the project year. The contractor and coordinator should prepare a proposal

for the Revised Budget and Activity Plan (RBAP), an overview on the mobility flows and handouts on the most important contractual rules relevant to the project. Partners from the Partner State(s) need to prepare a proposal for the planned mobility flows.

- Monitoring meetings should include a project overview. Project objectives, the roles of partners, a review of the work to date on a partner by partner basis, or on the basis of different categories of activities. A review of the budget should take place.

10.7.2. External communication: telling other people about the project

Dissemination of the information about a project will enhance its impact. The project team should plan to do this at several levels:

a) Departmental
b) Faculty
c) University
d) National and international (professional conferences, contact with national and international organisations).

Local dissemination of information is as important as national and international presentations. All too often several international programmes are run within one institution with little communication between the relevant teams. Maximally use newsletters, notice boards etc. Encourage your team to publish their experiences in professional journals, particularly within the Partner States. There should be a calendar of meetings and a forward plan of the information activities so that the deadlines for presentations, abstracts etc. are not missed.

11. ENSURING THE LONG-TERM EFFECT OF THE PROJECT

A project is a pump priming activity which is worthwhile only if its effects persist beyond the original period of Tempus funding. The project team needs to hold this long-term view throughout the project. The long-term planning should start at the beginning of the project. Each project activity should be continuously assessed with respect to its potential long-term effect and prospects for medium to long-term funding. In many cases it is unlikely that the universities in the Partner States will be able to completely take over the funding of the Tempus project. Almost inevitably some other source of external funds will be required. Initiate this early in the project. Establishing cooperation and, in particular, funding, takes time. Start thinking of long-term funding as soon as first results are achieved. Show the results to the prospective sponsors.

Ways of maintaining and developing contacts initiated by a project	
1	Partnership agreements at university, faculty or departmental level.
2	Contacts through international associations.
3	External funding through chambers of commerce, town halls, regional authorities etc.
4	Funding through cooperation with industry.

Critical mass. The concept of critical mass is that the single individual has much less chance of maintaining and developing the project or to change the system than a group of people who understand each other’s goals, aims and work methods. Plan the staff exchange with the achievement of a critical mass in mind. Sustainability of any activity requiring specific skills cannot be guaranteed if dependent on one person alone. If you need to introduce new equipment, software etc. make sure that a sufficient number of people are trained to efficiently use them.

Another factor to be taken into account is the level of seniority of individuals who are going to carry on project activities beyond the funding period. Train people at different levels of seniority to secure institutional embedding. The concept of "training the trainers" is important. All the above emphasises the necessity for a careful selection of personnel for training abroad. The main selection criterion should be the individuals' future potential impact on the system and their capability to train other people.

12. MOBILITY PROGRAMME

Development of human resources through staff and student exchange (mobility programmes) is an important part of projects. The amount of money allocated to staff retraining and teaching usually constitutes a substantial part of the project budget.

12.1. Staff mobility

Tempus funds the mobility of university staff (academic or administrative) which includes teaching/training assignments, retraining and updating periods, intensive courses, short visits and practical placements.

Trained staff probably provide the best guarantee of long-term structural change. Investment in staff exchange should strategically yield the best "value for money". Sometimes the proportion of money allocated to mobility may seem excessive. However, cooperative programmes work much better if they are based on a network of personal contacts. Otherwise, the contacts tend to be formal and the work less efficient. The necessity for travel in the formative period of international network, is of course quite different from the aimless travelling known as "academic tourism". The Project Management Team needs to periodically review the staff exchange programmes and assess whether potential benefits to the project justify the travel.

Mobility planning. Long-term effects of mobility depend on the right choice of participants. Choose the wrong people and the money invested in staff exchange will be wasted. In order to tailor the project training programme to the institutional needs, it is essential to carefully discuss the future type and numbers of trained staff required in the target institution. All too often the selection of candidates is haphazard and does not utilise in full the potential of institutions in the Partner States. Discuss this at the beginning of the project before the mobility programme starts. The following factors are important in planning of mobility:

a) Critical mass. Plan how many individuals trained abroad will be needed to ensure the lasting effect of the programme at the target institution.

b) Institutional strategy. Establish whether the department sending staff for retraining has a strategy for the use of newly acquired expertise. Is it prepared to promote/give authority to trained personnel so that their acquired skills can be maximally utilised ?

c) Is the head of department supporting the aims of the mobility programme ? Is the faculty/university prepared to utilise new skills and facilitate sharing them with other departments ? Is there a database of retraining programmes held at the faculty/university level ? If the answer to most of the above questions is “no” perhaps the start of the mobility programme needs to be delayed while these problems are addressed.

Discuss the above questions with the relevant departmental/ faculty authorities. Regular meetings of the Project Management Team with these authorities are essential.

Selection of candidates for training. When selecting individuals for retraining programme take the following factors into account:

a) Motivation to learn: is the candidate genuinely interested in learning new skills ? Does he/she know what he/she wants to learn ?

b) Career plans: does the candidate have a long-term aim and a plan of how to achieve it ? Is the candidate going to apply what he/she learned within the target institution or does he/she plan to move elsewhere ?

c) Immediate usefulness of the trained candidate to the project. It is a good idea to retrain individuals with the greatest potential at the beginning of the project and immediately involve them in the project activities.

d) The level of language proficiency. Language preparation is an underestimated part of Tempus projects. There is a big difference between being able to get by in a foreign language and being able to be a partner in, for example, professional discussions abroad. A lot of what is perceived as a patronising attitude from the Western universities stems from a communication block. This is not to discourage anybody, but to say that candidates should be strongly encouraged in intensive language revision/training. In addition project leaders in the universities hosting retraining should explore the possibilities (and costs) of continuing language training during the actual retraining period.

e) It is strongly recommended to interview prospective candidates for the mobility programme in the presence of university representatives.

Linguistic backup at Partner States and EU universities. Most universities do have a language department. For a project coordinator it is well worth visiting such a department to discuss the project and its implications for linguistic training. Often the intensity and/or the level of courses are not appropriate for the requirements of intensive staff exchange. There are two ways of approaching this problem. One is to stimulate the target university to expand existing courses, the other to provide some project funding for linguistic preparation. Generally, the Partner States universities should be encouraged to put maximum emphasis on advanced language training. Make sure that the prospective project participants are aware of potential language difficulties and that they use the facilities for improving the linguistic ability, both at home and, if possible, at the EU university. It is important to provide the visiting fellows with information about the opportunities for on-going language training at the host institution.

Staff training programmes in the EU institutions. The ability to efficiently train visiting fellows is a complex skill. The coordinator should not take it for granted that the EU institution is able to provide a structured training programme. It is all too easy, in a busy department, to leave visiting fellows to look after themselves. Discuss the following with your project leader and his head of department before commencement of the programme:

Is there an existing training programme in the host department ? Is it documented ? Is there a written timetable ? What is the departmental track record ? How many people were trained last year ? Which staff members are responsible for training ? Confirm with the head of department how much time the departmental staff will be able to spend with project trainees. Does the head of department support the training programme ? Are there plans to involve visiting fellows in the mainstream of the institution's work (this may involve applications for work permits/professional registration etc.) ?

Performance monitoring. Monitoring of the visiting fellow's performance and indeed the adequacy of re-training is necessary. It is essential to assign individual supervisors for the whole, or parts of the training period in the host department who would review the progress of trainees.

Teaching visits/visiting lecturers. Short-term teaching visits of EU academics to a Partner State institution play an important role in the transfer of skills and international team building. To maximise their impact they need to be planned with care. Consider the following:

a) Time available: make sure the lecturer is prepared to spend enough time in the target institution. Will he/she be prepared to spend time on informal discussions ?

b) The usefulness of a lecturer's expertise to your target institution. Will he/she be able to teach you/your staff what is needed ?

c) Exposure of junior members of staff. It is important that all grades of staff benefit from teaching visits. It is unwise to limit the contact of visiting lecturers to senior staff. Provide time for meeting junior staff, research students etc. It is particularly important that people who are prospective candidates in mobility are involved in this.

d) Can the lecturer's expertise be used beyond a departmental level ? Organise a faculty lecture ? Organise discussion ? Invite students ? Invite other individuals interested in international collaboration ?

e) Prepare a programme of teaching visits and notify the lecturer in advance. It is essential that the lecturer knows exactly the form, titles and duration of his presentations/ seminars and what audience to target.

f) Prepare the audience. Who in the institution will be interested in meeting this lecturer ? Notify appropriate people in advance. Advertise widely. The image of the institution depends on how efficiently visits are managed. An unstructured visit projects the department as being poorly managed.

g) Please remember that to go to the target institution the visiting lecturer has sacrificed time which he would have otherwise spent on research or grant preparation. He/she has to feel that this time has not been academically wasted. Recognise this. Are there any academic credits, or other recognition, the target institution can offer ? Make sure that you know the lecturer's research interests. Is there anybody in the target institution whom he/she could meet ?

Practical aspects of staff exchange

Starting the staff exchange. Heads of departments in all host centres need to be fully aware of the requirements, timetable and staff commitments required for the re-training programme. Organise a departmental meeting before the project starts, to explain the aims and objectives of staff exchange to the academic and supporting staff.

Correspondence with prospective participants. Send the programme of activities to the prospective participant and also to his superior, so that these can be discussed and agreed before the person joins the team abroad.

The appendix shows an example of a letter sent to the prospective participant of mobility. To avoid misunderstandings, it is essential to mention in any correspondence with prospective visiting fellows, that the sum of money payable to them may differ slightly according to the fluctuations in the exchange rates. Always let the grant recipient know the name of the person he/she should contact to explain financial details.

The requirement for the Individual Grantholder Report should be included in the initial letter to the prospective fellow. It is important that the reports are completed before the fellow leaves the host university.

Remember that the visiting fellows might need introductory letters from the project coordinator to the bank, the university library etc. Don't forget the arrangements required for medical insurance policies.

Staff mobility. Essential issues	
1	What is the function of the staff mobility in the context of the project objective ? How does it relate to the needs of the institution ?
2	What is the intended output of mobility ?
3	Is there an institutional policy on the optimal use of mobility grants and external teaching staff ?

Staff mobility. Planning and preparation of staff teaching visits	
1	Define the main focus and content of the programme.
2	Define the target group.
3	Define the language of presentation and discussion (check audience proficiency level). Are supporting materials/notes/ translators required ?
4	Prepare a detailed programme of the visit and distribute it to interested staff members.
5	Check technical details: place, state of audio-visual equipment etc.

12.2. Student mobility

Student mobility forms an integral part of almost every JEP. Student mobility can include study periods, practical placements and participation in short, intensive courses.

Academic recognition. The study period abroad is a valuable experience for students. However, for the optimal use of mobility, academic recognition is essential. It is important to discuss at the beginning of the programme the level of academic recognition which will be achievable. Ideally, the period of study abroad should be integrated into the home curriculum. Clarify the procedures related to academic recognition with the relevant academic authorities, i.e. dean, academic senate, or national higher education authorities. Whenever possible, partners should consider using the procedures applied in the

European Community Course Credit Transfer System (ECTS).

European Community Course Credit Transfer System (ECTS). The ECTS is now being piloted throughout EU in chosen disciplines and does not at present include the Partner States. However, wherever a JEP includes student mobility it may be important to acquire the appropriate information on ECTS and train the member of academic/administrative staff in general issues of academic recognition. It is essential that the JEP partners agree on the methods of crediting the students participating in the mobility.

For further information on ECTS please contact:

The Socrates Office
Rue Montoyer 70, 1000 Brussels.
Tel: 00/32/2/233.01.11 / Fax: 00/32/2/233.01.50

Internationalisation of study programmes. Internationalisation of study programmes involves the development of student exchange and courses or complete curricula offered in a foreign language. The concept is attractive to many universities because of the potential for income generation from the intake of foreign students. Discuss within the target institution whether internationalisation is a part of the planned institutional development and if so, how JEP activities may contribute to this.

If internationalisation is a part of the institutional policy, the language used for teaching materials which may be developed in the course of JEP should be discussed. It could be that, for example, development of teaching materials in English is preferred.

Planning the student mobility. It is essential that the host and home institutions agree on the programme of study abroad. In addition the host institution should develop the logistical backup of the programme. Student supervisors should be selected and full information on the courses should be provided in advance to prospective candidates.

Incorporating student mobility into overall JEP programme. A model for student mobility could combine the student and staff mobility so that some supervision/tutoring could be provided abroad by the staff from the home institution.

Practical placements for university students. The aim of practical placements is to offer on-site training within enterprises. It is important that the placement planning involves both the enterprise and the home institution. Selection criteria and procedure are important. Consider the following:

a) How relevant will the practical placement be for developing personal skills of staff and students ?

b) What is the intended impact/output of the practical placement on the home institution ? What is its function in the structural development of the department/university ?

Preparation for study abroad. The usefulness of the period of study abroad depends partly on the level of preparation. It is essential that students are informed well in advance of the requirements for the period abroad, in academic terms (e.g. preparatory reading, detailed comparison of courses, the attendance of special seminars/courses before the study period), in cultural terms, and particularly in a linguistic terms.

Infrastructure. There should be a designated person in the host department who can deal with logistical problems such as finding accommodation and organising a first introductory period.

Methods of assessment of student mobility. A student’s work abroad needs to be assessed by both the host and the home institutions. They need to agree on the details of assessments/ examinations. Students need to be well informed about assessment procedures. The results achieved during the study period abroad should be assessed either through examinations at the host university or by the supervisor at the home university. Students also have to prepare the individual Grantholder's Report.

Costs of student mobility. The host university can claim institutional costs to cover the costs entailed as a result of receiving students from abroad. Please refer to Guidelines for the Utilisation of the Grant for details.

Student mobility. Essential issues.	
1	What are the training/study goals ? What are selection criteria for candidates ?
2	What preparation is required of candidates (reading, advance details on curricula, necessary background knowledge etc.) ?
3	Has the issue of institutional academic recognition and credit transfer been addressed ?

12.3. Practical arrangements for staff and student mobility

Making visitors comfortable. Assign a person in the department to be responsible for the administrative matters related to visitors. It is also useful to provide visitors on arrival with a package containing:

a) Information concerning their accommodation and its price.

b) A local town/university plan.

c) Suggestions as to meal arrangements. Nearest shops.

d) Location of banks.

e) Location of the library.

Travel. It is useful to identify a single travel agent who will handle all the travel arrangements within the programme. Leading travel agencies can arrange the international distribution of tickets. Please remember that cheap tickets often need to be booked as much as two to four weeks in advance and that including a Saturday night in the timetable of the visit usually saves a substantial amount of money.

Visas. The formalities might take time to be completed and therefore should be prepared in advance. Project participants from the Partner States sometimes experience problems in obtaining the entry visas into EU. You can also contact Tempus Information Points for additional assistance in the visa matters. It is worth noting visa formalities for a stay in the EU exceeding three months can take a longer time and often require a different procedure. In addition some EU Embassies in the Partner States require the original invitation letter. To avoid complications always make sure that you clearly indicate in the invitation letters, that the medical insurance costs will be covered by the host university from the Tempus grant. Please refer to the table in the Annex for further information on visa requirements, for example, for Russian participants. Do not hesitate to contact the ETF Moscow Office and Tempus Information Points in the respective countries for additional assistance with visa matters.

Work permit/registration with professional bodies. Work permits/registration certificates, may also take a long time to arrange and require specific documentation. It is therefore essential that applications are submitted early.

Medical insurance. The regulations for medical insurance of academic staff and/or for students vary considerably in different European countries. It is essential to make sure that all project participants are adequately covered both when working abroad and when travelling. To avoid complications always make sure that you clearly indicate in the invitation letters, that the medical insurance costs will be covered by the host university from the Tempus grant.

Accommodation. Planning of this is essential particularly for the student mobility. Establish whether the host institution has an office dealing with student/visiting staff accommodation. Check the availability of this accommodation and make sure that this is sufficient for the number of students planned. Check the price of accommodation. For longer term visitors it is a good idea to arrange accommodation at the university for an initial week or two and to allow the visitor to then make his/her own arrangements. Always inform the visitors of the price of accommodation in advance. During the academic year, university campus accommodation may be in short supply, make your arrangements early.

Payment methods during the stay abroad. Students and staff have to be reliably informed on the financial conditions/ constraints before the period abroad starts. Establish whether an immediate payment on arrival is required and arrange this with your Finance Office. For participants in longer training programmes it is still a good idea to arrange a small payment in cash on arrival to give the visitor time to open a bank account. It is good policy to pay subsistence allowances monthly. Avoid paying the grant in one instalment.

Database of institutions participating in the student mobility network. Develop and regularly update the database which should contain the following:	
1	Basic information on the participating institutions.
2	Details of the relevant curricula.
3	Time schedule of the academic year.
4	General and language requirements for the enrolment of foreign students.
5	Information on accommodation in the host institution.
6	Information regarding visa and registrations with the police.
7	Information on health insurance.

13. FINANCIAL MANAGEMENT

13.1. Financial monitoring system for the Project Coordinator

The coordinator needs to have an up to date view of the project finances and be able to carry out projections of expenditure with the minimum of effort. Monitoring project finances will appear much less complex if a financial monitoring system is devised before expenditure starts. This should consist of a master database along with standard expenditure forms (see appendix). Such forms introduce an accounting discipline and save a lot of time during the reporting periods.

In the design of forms it is important that the budget headings correspond to these in your project contract and in the Annual/Final Report form. Check with your Finance Office whether appropriate accounting codes/headings can be assigned to your account so that the university computer printout matches your budget headings.

It is well worth spending time at the beginning on making a foolproof accounting system. This saves time when it comes to reporting.

Contractors should check with the Information Department of the ETF as to the availability of project guidelines, Annual/Final Report Forms on diskette or on the World Wide Web. Continuous efforts are being made to introduce forms and additional information in diskette/WWW form to assist Contractors.

13.2. General rules

Read carefully your Guidelines for the Utilisation of the Grant. These will give you a complete picture as to what you can and cannot do. Pay particular attention to contractual limitations such as:

1. Minimum sum to spend on equipment.
2. Limitations on transfer of funds between budgetary headings.
3. Upper limit of staff costs and overheads allowed.
4. Maximum sums allocated for subsistence in the mobility programme.

Your university may be asked to return the money if you spend it on items which are ineligible. If in doubt talk to your Programme Manager. Keep a record of your conversation/correspondence.

13.3. Travel and subsistence

Payment rates have to be discussed with the prospective candidates. A mistake in stating the amount to be paid can later result in prolonged disputes. Indicative amounts are specified in the Guidelines for the Utilisation of the Grant.

13.4. Equipment

Equipment is only a tool: buying equipment is only one of the aspects of the project and is not necessarily the most important one. A large JEP has considerable buying power. One should remember this in negotiations with the equipment suppliers, there is normally a good chance to negotiate discounts. Prospective suppliers should provide a written quotation (proforma invoice). Remember that only equipment manufactured in the EU and Partner States can be bought on the Tempus grant. As of 1996 equipment of non-EU or non-Partner State origin which is assembled or imported in an EU or Partner State country may be purchased when no EU or Partner State equivalent is available. NB: your grant does not pay for taxes, custom duties etc. Contact the local university Finance Office and the Tempus Information Point for assistance in obtaining tax and customs clearance. Note that the current procedure applied to all Tacis projects is rather lengthy and can take up to a month, therefore it is advisable to start the procedure before the equipment has actually reached the border point. It is also worth noting that several Partner States suppliers now have accounts in Western Banks, this can facilitate the transfer of payments enormously and naturally involves less risk.

The minimum allocation for equipment per annum, as quoted in the Special Conditions of your contract, must be expended in the contractual year as no funds may be transferred to subsequent years.

13.5. Academic Staff Costs

Providing a fee is a helpful inducement, particularly when the project objectives require completion of a task as a matter of priority. Setting the level of academic fees can be difficult. Clearly, the Tempus Programme cannot provide for academic fees equal to commercial consultative rates. It is worth considering that the size of the academic fee should, at least to some extent, be proportional to salary levels. Please note that no academic staff from the Partner State can be paid from the Tempus grant. The reasoning behind this decision is that projects which rely heavily on the external payment of academic staff in the Partner State, are not very likely to sustain the project results once the Tempus funding has been stopped. Projects in Partner States, where the Partner State has invested its own academic resources are evidently more likely to survive.

13.6. Administrative Staff Costs

Administrative staff costs may be paid to EU and Partner State Institutions. These costs are strictly for administrative tasks performed in order to manage and achieve the objective of the project. Costs covered by the project must reflect local rates and not be covered by funding from any other sources.

13.7. Expert fees

The involvement of experts from EU member states, non-EU G24 countries, Phare countries, NIS and Mongolia is permissible on a limited scale and under the guidance of the project consortium. Experts may be invited to provide special knowledge or skills in a particular field by participating in certain activities. Fees offered to experts must not exceed local rates.

13.8. How to carry over funds from one academic year to the next. Reporting activities which overlap two academic years (only for JEPs)

Within the present contract it is possible to carry over unspent money from one academic year to the next within the contract period. E.g., if due to organisational difficulties a number of student flows were to be postponed from the academic year 1994/95 to 1995/96, the money allocated for these flows should be indicated in the RBAP for 1995/96 as unspent in 1994/95, but the total sum planned for student mobility for 1995/96 will need to be appropriately increased. Please note that equipment purchases cannot be delayed under any circumstances and are thus non-transferable. To ensure the availability of equipment for the project, the yearly minimum allocated for equipment purchases should be strictly adhered to.

The present contracts also enable the overlapping of activities over two academic years within the contract period. Such activities should be reported in the Annual/Final Report for the year in which the activity was completed and paid for. If activities are not completed (or paid for) before the 31 August in any given year they should not be included in the Annual Report. Sums of money related to such activities should be indicated as 'unspent'. It is unacceptable to report expenditures which are not supported by invoices. If e.g. due to problems with visas, students who were supposed to follow a course at an EU university in 1994/95, were to miss the start of the first term, it could still be possible for them to follow courses starting in the second term and continue their stay into the following academic year. However, these flows should not be reported in the Annual Report for 1994/95, but in the Annual Report for 1995/96. The total amount used for these mobility flows should be indicated as unspent in the Statement of Expenditure 1994/95 and should be included in the RBAP for 1995/96.

13.9. Mobility. Calculating amounts of subsistence allowance

Tables included in the Guidelines for the Utilisation of the Grant show the indicative amounts of mobility allowance for a number of time periods. To calculate upper limits for duration's other than those given in the tables, take the shorter duration as a baseline and add an appropriate proportion of a difference between the longer and shorter period allowance.

For example, the tables indicate 4 and 8 weeks allowances. To calculate an upper limit for a 5 week period, take the amount for 4 weeks (the lower duration) and add ¼ of the difference between the allowances for 8 and 4 weeks. Using the table in the Annex I/11 of the contract this will be:

ECU 1,600 + 1/4 (2,400 - 1,600)= ECU 1,800

14. RUNNING THE PROJECT - WHAT TO DO FIRST

The first phase of the project is normally the most difficult, but if well executed it may avoid problems later. Before the activities start ensure the following:

14.1. Confirm the workplan

Prepare and submit the Revised Budget and Activity Plan (RBAP). The Project Team needs to present the RBAP to the European Training Foundation within the first two months of the project and then every year by *the deadline indicated in the Contract*. After signing a JEP contract the contractor will receive 50% of the total grant for the first year. The allocation of the remaining 50% depends on the approval of the RBAP by the European Training Foundation.

Checklist for the final workplan (RBAP)	
1	Is the objective stated in the contract correct ?
2	Has the situation in the partner institutions changed since the project application ?
3	What are the outputs expected for the first year ?
4	Have the outputs been accepted by all the partners ?
5	Is there enough money to carry out all planned activities ? If not, what should be modified ?

14.2. Confirm the management structure

As stated above, a well-defined management structure is essential for the smooth running of the project. Please refer to the table below.

Management structure checklist	
1	Who is the overall Project Manager ? If it is not the coordinator, who will make the final decisions ? What is the decision making procedure ?
2	If the contractor and the coordinator are not the same person, has the decision making process been established ? Who represents the contractor ?
3	Is there a project leader in each participating institution ?
4	Is there a deputy for every key person ?
5	Has the management structure been accepted by all the partners ?
6	Has the responsibility for project activities been assigned to individuals ?
7	Are procedures for monitoring and reporting in place ?

14.3. Establish procedures for money transfer

Establish contact with the Finance Officer(s) of the partner institutions. Ask for the names of individuals responsible for project account and meet them at the earliest opportunity. Include them in your project participants database. Make sure you can easily contact them.

Open the accounts. Ask the Finance Officers in partner universities to open appropriate project accounts and notify you of the details. Please note that in the partner state institutions there are often regulations which make it impossible to open specific accounts outside the university accounts.

Design standard procedures. Design standard transfer forms for use in communications with your Finance Office and adopt standard procedure for managing transfers. Possible procedures could involve (see appendix for an example of relevant letters):

a) A “Request for Transfer” form sent to the contractor’s Finance Office.

b) A “Notification of Transfer” form including a disposition note faxed to the Finance Officer in the Partner State institution with a copy faxed to the local Project Leader.

c) It is useful to request a written undertaking from each of the partner universities’ Finance Offices, that the transferred funds will only be spent on authorisation of the local Project Leader (see appendix).

Learn how the money travels: ask which banks are involved and get as many names of persons responsible for the account as possible. This saves a lot of time and trouble in tracing your money if problems occur. Test the transfer system before you transfer a large amount of money: the first transfer should be small to minimise risk.

15. SYNOPSIS OF PROJECT DOCUMENTATION AND CONTRACTUAL RULES

Project documentation defines the rules for its management. The importance of project documents is hierarchical. The hierarchy is as follows:

1. Special conditions of the Contract.
2. Revised Budget and Activity Plan (only for JEPs).
3. Guidelines for the Utilisation of the Grant.
4. General conditions of the Contract.
5 Guide for Applicants.

Legal responsibility. Legally responsible to the European Training Foundation, is the contracting institution.

Limited funding period. The funding period of any Tempus project is strictly limited and stated in the contract. Money cannot be spent on anything before or after the contract period.

Required reports

1. At the beginning of project year 1, provide the European Training Foundation with a RBAP for the first year by the date stated in your Contract.
2. By the end of the first and second year of the project, the contracting institution is required to provide a Commitment Letter stating its wish to continue the project.
3. Each project year the following documents require to be submitted by the date stated in your Contract
   a) Annual Report and Statement of Expenditure
   b) Individual Grantholder Reports
   c) Revised Budget and Activity Plan for the next academic year.
4. At the completion of the project, the Final Report and Statement of Expenditure including Individual Grantholder Reports have to be submitted by the date stated in your Contract.

Records you need to keep. The list of documents which you need to keep for five years is enclosed in the Guidelines for the Utilisation of the Grant.

Copyright. Any copyright regarding the materials created during the grant period belongs to the contracting institution. Contracting Institutions should remember to acknowledge Tempus support in any materials that were generated as a result of full or partial Tempus funding.

Insurance. The European Training Foundation is not responsible for accidents, illnesses, maternity leave cover etc. The contractor must draw the attention of all the partners to this.

Operating the Tempus account.

1) The university needs to set up a special Tempus project account.

2) Given the difficulties connected with banking and payment in the Partner States, cash withdrawal can be made from this account; however, when cash withdrawals are made, receipts must be obtained and kept. Normally banks would provide such receipts.

3) You should keep Tempus project money in either ECU or convertible currency. If there is a need to deal in non-convertible currencies, only convert the money as and when necessary.

Interest on project account. Remember to spend all of your accumulated interest by the end of the contract period. Notify your institution about this so that the Finance Office or the bank can let you know what interest has accrued in plenty of time.

Sub-contracting: This is defined as the use of services of people or institutions which have no direct or indirect link to an institution participating in the project. You can sub-contract activities within the grant. This includes teaching/training assignments and short visits. However, the activities can only be contracted to institutions located in the EU member state or in the Partner States involved in the project.

Taxes. Equipment and services executed under Tempus are exempt from VAT and from other taxes, duties and similar charges in both EU and Partner States. Tempus will not reimburse money paid in taxes. The relevant certificate is provided with your contract.

Changes to the original expenditure plan

1. After your RBAP has been approved, you have to ask the European Training Foundation for written authorisation if your spending under any heading exceeds the original allocated amount by more than 10%.
2. Change of more than 25% in the number of flows in each of the two mobility categories (staff or students) also requires written authorisation.
3. Transfer of money from the mobility grant to the organisational grant, requires authorisation. You cannot transfer mobility money to cover overheads or staff costs.

Organisational grant. Main budget headings within the organisational grant are staff, equipment, other costs and overheads.

Staff costs. Remember the respective ceilings for staff costs. For JEPs, staff costs cannot be higher than 25% of the total grant and not higher than 80,000 ECU per year. Importantly, fees and salaries paid to partner institutions and to sub-contracting institutions are also considered as staff costs. Document your staff costs with a convention (agreement) for any person employed.

Academic costs: You can pay replacement costs to the EU institution, to replace teachers for a minimum period of 1 month (a maximum of 2500 ECU per uninterrupted month on the basis of actual costs) can be claimed up to a maximum of 10 months. You can also pay academic staff for an exceptional, limited and justifiable task. Academic staff can also be paid for administrative tasks. Academic fees cannot exceed 10% of the total grant.

Equipment cost. Please check the definition of equipment in your Guidelines for the Utilisation of the Grant. Equipment must originate in an EU member state, in a Tempus Tacis or Phare Partner State. Relevant certificates are required. As of 1996 non-EU or non-Partner State origin equipment, imported or assembled in an EU or Partner State country may be purchased if no EU or Partner State equivalent can be found. Quotations from three independent suppliers are required if you spend more than 10,000 ECU on equipment.

Overheads. If your overheads do not exceed 2.5% of the total grant in any given year you do not need to provide supporting documentation. You can spend up to 5% if you provide a detailed account of all expenses.

Mobility grants. Guidelines for the Utilisation of the Grant are quite specific as to the indicative amounts of subsistence and accommodation costs.

Mobility participants have to provide an Individual Grantholder Report which needs to be sent to the contractor and is an important part of the Annual/Final Report. Familiarise yourself with the categories of mobility in the Guidelines for the Utilisation of the Grant.

Familiarise yourself with expenditure which is not eligible for a mobility grant. Student (but not staff) mobility includes the institutional costs paid to the host institution. Institutional costs may be paid only for study periods at the universities and not for practical placements or participation in intensive courses.

16. PROJECT ACTIVITY CHECKLISTS

It is beyond the scope of this handbook to provide detailed guidelines or suggestions for every possible project activity. These will differ according to the type of institution involved. A number of the suggestions mentioned in the preceding chapters will apply to all of the activities. The tables compiled below are meant to serve as an aide-mémoire and to remind the coordinator and the Project Management Group of the factors which could be important for particular activities.

Curriculum development. General Issues *Consider:*	
1	The strategy of the university/faculty.
2	The level of support by the institutions' academic bodies.
3	Approval of the relevant academic bodies.
4	National policies: approval by the relevant ministry/recognition by national authorities.
5	European compatibility.

Curriculum development. Assessment of existing courses and requirements for new courses *Assess:*	
1	Competence and potential for development of the existing academic staff. Is staff training required ?
2	Existing equipment.
3	Possibilities for continuation of the new programme at the end of the project funding. A strategy for gradually replacing visiting academic staff by local personnel.
4	Scope for adaptation to local needs.

Curriculum development. Designing new curriculum	
1	Are the objectives of the programme clearly defined ?
2	Is the content of the curriculum appropriate to its objective ?
3	What is its relation to existing curricula ?
4	What is the structure of the programme: proportion between lectures, exercises and project work ?
5	What is the entry level of students ?
6	What are the assessment procedures ?
7	What is the final output: diploma/degree ?
8	Is a pilot phase for implementation planned ? How will it be evaluated ?

Staff development

1	Is there an academic/administrative staff development strategy within the institution ? How will the new staff training/developing activities complement existing activities ?
2	How will the staff development activities contribute to other aspects of the project (e.g. the restructuring of curricula) ?

Creation and restructuring of higher education centres (Setting-up of new management structures and the development of infrastructure for postgraduate courses). *Consider*:	
1	National legislation.
2	Strategy of the university/faculty/department.
3	Organisational embedding/institutional support. Involve the relevant academic bodies of the institution concerned in the planning and decision making process.
4	Coordination of the project activities with other relevant initiatives at the university.
5	Definition of objective for the new structure.
6	Services offered by the new institutional structure.
7	Competence of existing staff. Is training required ?
8	Required equipment.
9	Relation of the new unit to units existing within the university.

Development of universities' capacities to cooperate with industry and other organisations This may include creation and/or restructuring of Technology Transfer Units and Continuing Education Units at universities, the development of training and consultancy centres for local industry at universities, the creation of practical placements in enterprises, and the exchange of staff between universities and enterprises. *Consider:*	
1	Coordination with other initiatives in this field.
2	Relation to the existing strategies.
3	Involvement of the relevant academic bodies in the development of new programmes.
4	Local conditions (legal framework, the situation of local industry).
5	University staff knowledge base/training of future staff.
6	The needs (innovation/qualification) of local industry.
7	Design and market of appropriate activities.
8	Creation of mechanisms for dialogue between industry and the university.
9	The role of each partner in the respective activities. The legal framework for raising external income at universities (accounting, distributing and using external income, employing staff from external funds etc.).

Intensive courses These are short courses providing targeted training in a specific subject. *Consider:*	
1	Intended outcomes.
2	Adaptation to local circumstances.
3	Utilisation of the expertise of personnel from all the centres and not exclusively from either the *EU* partner institutions or partner states.
4	Language proficiency of the audience (provision of translated summaries, copies of slides and overheads etc.).

Upgrading of facilities and equipment This refers to acquisition of equipment for use in libraries, teaching laboratories, teacher training centres, documentation centres, etc.	
1	Assess the equipment needs of your programme (student numbers etc.).
2	Discuss whether the planned equipment is essential for the achievement of the project objective.
3	Coordinate the specification of equipment with the investment policy of the university to guarantee compatibility.
4	Identify potential suppliers and invite them to tender.
5	Consider after-sales support and service and medium- to long-term maintenance.
6	Ensure proper scheduling in order to avoid problems at the end of the project year.
7	Define requirements for staff training in the use and maintenance of purchased equipment.
8	Review the future accessibility of the equipment.
9	Calculate utilisation time. Does the projected utilisation/ number of users justify the expense ?
10	Always ask the question: can the money be spent more efficiently on something else ?

17. APPENDIX: STANDARD FORMS

This appendix shows examples of standard forms which can be used during the project to standardise and simplify communication. It is, of course, not obligatory to use these forms, but they may facilitate the management of project. In any case, the forms shown should be modified to suit the needs of individual programmes.

APPENDIX:
Standard Forms

Please note the examples of the forms hereafter
are given for guidance only

Please find a sample letter in English and Russian requesting tax exemption for the equipment imported into the Russian Federation

Moscow, ...

TO WHOM IT MAY CONCERN

(recipient) is a partner of the project which is being implemented and funded by the European Commission within the Technical Assistance to the NIS States (project No)

- The aim of the project is ....
- The implementation of this project envisages the delivery of the equipment which will be used for..
- The equipment is going to be cleared (or currently staying) at (regional customs point)
- The equipment purchased by the European Commission's funds for this project will not be used for commercial purposes.
- Due to above and in accordance with the intergovernmental agreements on humanitarian and technical assistance to Russia, I kindly request you to produce a relevant conclusion to the State Customs Committee of the Russian Federation regarding the exemption of this equipment from customs import duty, VAT, special tax (3%) and other similar fees.

Yours sincerely,

Director General

Enc.: Customs waybill (list of equipment)

Russian version

…, ...

•

•

•

•

•

Директор организации-получателя

Приложение: таможенная накладная (перечень оборудования)

EU TEMPUS PROGRAMME - PROJECT N°...................................

Proposal to open or use existing bank account for Tempus Project purposes

Institution address: ....

....

Name of bank: ....

Bank address: ....

....

Account name:.. Bank code: ....

Account number: .... Currency: ....

Person(s) authorised to sign:

Name: .... Signature: ....

Name: .... Signature: ....

As Administrative Head of (institution)/Finance Officer I confirm that the above account will be used for the purposes of TEMPUS Project expenditure and that any expenditure will be authorised by a project coordinator. I understand that European Union rules require that all documentation related to this account must be retained for a period of at least five years after the end of the Project.

Name: ....

Signature of authorised person: ....

Date: .... Official stamp of the institution

REQUEST FOR MONEY TRANSFER

To: The Finance Officer
Finance Office
Address of University (contractor)

Date:

Account N°:.. Tempus Project N°:..

Please transfer the sum of ....

to the account of:..

University 2

(Tempus Project N°:...)

Bank address: ....

Account N°:..

Disposition (Please enclose this note with the transfer):

These funds are to be utilised as follows:

Item		Rubles
support for postgraduate meeting	refund	91,904.00
textbooks English language	refund	570,000.00
computers Dept of Medicine	refund	10,543,728.00
software comp graphics	advance payment	47,250,000.00
Total		58,455,632.00

These funds are to be spent under instruction from Dr. . ...
(Russian Contact person) at the Dept. of Medicine, University 2, tel..
Full accounting will be required for advance payments.

Yours sincerely,

Programme Coordinator

NOTIFICATION OF MONEY TRANSFER

To: Finance Officer
Address of University (contractor) ....
....
Date: ....

EU TEMPUS PROGRAMME - PROJECT N° ....

This is to inform you that I have now transferred a pound sterling equivalent of a sum of 58,455,632.00 (fifty eight million, four hundred and fifty five thousand and six hundred and thirty two) rubles to the account of:

University 2

(Tempus Project N°:...)

Bank address: ....

Account N°:..

Disposition:

These funds are to be utilised as follows:

Item		Rubles
support for postgraduate meeting	refund	91,904.00
textbooks English language	refund	570,000.00
computers Dept of Medicine	refund	10,543,728.00
software	advance payment	47,250,000.00
Total		58,455,632.00

These funds are to be spent under instruction from Dr. . ...
(Russian Contact person) at the Dept. of Medicine, University 2, tel...
Full accounting will be required for advance payments.

Yours sincerely,

Programme Coordinator

Copy: Russian Contact Person

STAFF/STUDENT MOBILITY NOTIFICATION OF PARTICIPANT

EU TEMPUS PROJECT N°.............................

Mobility Participant

University 2

Departmental address ....

....

Date: ....

Dear Dr. ....

It is a pleasure to confirm your acceptance as the participant to be assigned to this department in the above EU programme. Your period in this department will commence on .... and will end on ....

You will receive a total grant of ECU .... (local currency depending on the exchange rate) to cover your travel expenses, subsistence costs and costs of accommodation in Ireland during this 24 week period.

Please note that medical insurance is obligatory and will be covered by the grant.

With regard to accommodation, I have been advised that it would be best to take short-term (few days) bed and breakfast accommodation at the University until you can make longer term arrangements, which probably cost .... per week.

Please note that on completion of your stay you will be required to submit to the Project Coordinator the Individual Grantholder Report. You will be supplied with an appropriate form.

The Project Coordinator's office will be able to book your flights and send airline tickets to you. Alternatively, you may arrange flights and tickets yourself and get a refund of your expenses after your arrival here. Please write or fax me which of these alternatives suits you best. Please give me dates of your preferred travel.

I look forward to meeting you.

Yours sincerely,

Project Coordinator (Ireland)

REQUEST FOR PAYMENT OF MOBILITY GRANT

To: The Finance Officer
Finance Office
University 1

Date:

EU Tempus Project N° .... Account N° ....

Dear Dr. ....

I would be grateful if you could arrange the payments of subsistence/accommodation allowance to Dr. .... at the Department of ...., University 1. Dr. .... will be coming to this Department for the updating/retraining period of 24 weeks' duration from .... until ....

Travel expenses	£	448.80	
Remaining for subsistence/accommodation	£	5,229.30	
Sum payable monthly	£	371.50	for 24 week period to be paid 4 weekly

Please make the following payments

Date	Payment (£)	Please record as
4 Nov 91	371.55	Allowance Wk 1-4
2 Dec 91	371.55	Allowance Wk 5-8
30 Dec 91	371.55	Allowance Wk 9-12
27 Jan 92	371.55	Allowance Wk 13-16
24 Feb 92	371.55	Allowance Wk 17-20
23 Mar 92	371.55	Allowance Wk 21-24
Total payable	5,229.30	

As discussed, I would be grateful if £100.00 of the first payment only could be paid in cash (to be collected at Finance Office) with the balance paid by cheque. Thank you.

Yours sincerely,

Programme Coordinator

PROPOSAL FOR STAFF MOBILITY

EU TEMPUS PROGRAMME - PROJECT N° ....

Proposal for Individual (Staff) Mobility

Name: ....

Institutional address:..

....

Institutional telephone: .... Fax number: ....

Home address: ....

....

Home telephone:.......................................

Institution to be visited: ....

....

Duration (weeks): ....

Proposed arrival date: .... Departure: ....

Please state below the proposed aims of your mobility period. Be as specific as possible in your identification of goals and outcomes. Start your statement on this page and continue to the second page. This statement will be very important in helping the host institution to ensure the success of your stay.

APPLICATION FOR STUDENT PLACEMENT

EU Tempus Project N° ....

(Page 1 of 2)

PERSONAL DATA

Last name: .... First name:..

Date of birth: .... Place of birth: ....

Nationality:.. Sex:..

Term address: ....

Country:... Telephone:..

Bank account:.. Bank: ....

IN CASE OF EMERGENCY PLEASE CONTACT

Name: ....

Country:... Telephone:..

Bank account:.. Bank: ....

EDUCATION

High school diploma (type of school, year): ....

University:...

Major:... Start of studies: ....

Area(s) of specialisation: ....

Title of diploma thesis: ....

For which course(s) do you earn credits.......................... Lecturer ....

I plan to graduate by (year):..

Major exams already passed: ....

APPLICATION FOR STUDENT PLACEMENT

(Page 2 of 2)

ADDITIONAL ASSETS (OTHER INTERESTS, KNOWLEDGE, ...)

DESCRIPTION OF THE DESIRED PLACEMENT

Desired countries: A, IRL

Duration of 6 months

Period from: .... to:..

Describe your reasons for applying for a Tempus placement:

Why do you want to apply for a Tempus placement ? Describe the kind of work you would like to perform.

Date: .... Place:................................... Signature:.............................

JEP PARTICIPANTS’ DATABASE

EU Tempus Project N° ....

PARTICIPANT INFORMATION

To enable us to communicate effectively within the project, it is essential that we have accurate information about each participant. Your cooperation in providing this information will appreciated.

For administration purposes only, we should like to store this information electronically. Complete confidentiality will be observed, but if you prefer that these details are not stored in a database, please put an “X” in the box alongside.

Please type if possible or print legibly.

Surname:	....
First name(s):	....
Institution:	....
	....
Department:	....
Position:	....
Institutional address:	....
	....
Institutional tel. number:	....
Institutional fax	....
Home address:	....
	....
Home telephone number	....
Languages spoken	....
	....

FINANCIAL MANAGEMENT (NON-MOBILITY) FORM

EU Tempus Project N° ....

Expenditure details

University code	Order sent	Payment authorised	Statement date
....	....	....	....

1. Date: ....

2. Item/activity: .... 3. Supplier: ....

.... Supplier's ref: ....

4. Cost: *Always calculate in £ Russian Federation and IRL*

Enter amount	ECU	Rub	or Punt
	....	....	....
Total	....	....	....

5. Exchange rate: Exchange rate local currency into £ .... Exchange rate £/ECU ....

6. Payment mode: .... Transfer n°: ....

University order n°: .... Transfer ....

to: ....

Other: .... Transfer date: ....

7. JEP classification: .... 8. Comments: ....

....

Budget category ....

Subcategory ....

Authorised by: .... Bill on file (name) ....

Signature: ....

FINANCIAL MANAGEMENT (MOBILITY) FORM

EU Tempus Project N° ....

1. Activity details	2. Cost: calculate in £ in Russian Federation and IRL
Purpose of travel:	Rubles or punt / £ / Ecu
Surname:	Air transport: ....
	Train/taxi: ....
Forename:	Travel total: ....
Current occupation:	
	Subsistence total: ....
Activity code:	Other costs: ....
Origin organis. code:	Total claimed: ....
Origin country code:	Total paid directly to claimant: ....
Destination organis. code:	Total spent: ....
Destination country code:	Number of nights: ....
Duration weeks rate:	Daily subsistence rate: / Exchange rate local: / Exchange:
£/ECU:	
Start date: .... End date:	Currency into £: ....

3. Classification	4. Payments
	University finance code ....
Statement date:	Transfer number: ....
Category:	Transfer to: ....
Date:	
Payment:	
Subcategory:	
Authorised:	
Authorised by: (please print)	5. Comments ....
Signature:	
Date:	

6. Bill on file (filename): ....

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USEFUL ADDRESSES

European Training Foundation

Tempus Department
Villa Gualino, Viale Settimio Severo, 65, I-10133 Torino
Tel: (39)11 630 22 22 / Fax: (39)11 630 22 00 / e-mail: tempus@etf.it
WWW: http://www.etf.it

Tempus Contact Points in the EU Member States

Austria

Tempus National Contact Point
Büro für Austauschprogramme
mit Mittel- und Osteuropa
Berggasse, 21/7
A-1090 Wien
Tel.: (43)1-3172793
Fax: (43)1-3172795
E-mail: florian.gerhardus@oead.ac.at

Belgium

French speaking

Tempus National Contact Point
Ministère de l'Education, de la
Recherche et de la Formation
Direction générale de l'Enseignement
Supérieur et de la Recherche
Scientifique
Cité Administrative de l'Etat
Rue Royale, 204
B - 1010 Bruxelles
Tel.: (32)2-2105511
Fax: (32)2-2105517
E-mail: none

Dutch speaking

Tempus National Contact Point
Ministerie van de Vlaamse
Gemeenschap
Departement Onderwijs
AHOWO/INT
Koningsstraat 136
B - 1000 Brussel
Tel.: (32)2-2114343
Fax: (32)2-2114385
E-mail: johan.geentjens@vlaanderen.be

Germany

Tempus National Contact Point
DAAD
Kennedyallee 50
Postfach 20 08 04
D - 53175 Bonn 2
Tel.: (49)228-882349
Fax: (49)228-882551
E-mail: wuttig@daad.de

Denmark

Tempus National Contact Point
The Secretariat of the Danish Rectors'
Conference
H. C. Andersens Boulevard 45
DK - 1553 København V
Tel.: (45)33-925436
Fax: (45)33-925075
E-mail: ib@rks.dk

Spain

Tempus National Contact Point
Ministerio de Educación y Ciencia
Subdirección General de Cooperación
Internacional
Paseo del Prado, 28-5°
E - 28014 Madrid
Tel.: (34)1-4201659
Fax: (34)1-4203737
E-mail: none

Finland

Tempus National Contact Point
Centre for International Mobility
(CIMO)
P.O. Box 343
(Hakaniemenkatu 2)
SF-00531 Helsinki
Tel.: (358)9-77477324
Fax: (358)9-77477064
E-mail: juha.ketolainen@cimo.fi

France

Tempus National Contact Point
CNOUS
6-8 rue Jean Calvin
F - 75005 Paris
Tel.: (33)1-40799141
Fax: (33)1-43374348
E-mail: none

Tempus National Contact Point
ACFCI
45 avenue d'Iena
F - 75016 Paris
Tel.: (33)1-40693700
Fax: (33)1-40693805
E-mail: none

Greece

Tempus National Contact Point
National Youth Foundation
Xenofontos 15A
GR - 11557 Athens
Tel.: (30)1-3245496
Fax: (30)1-3247993
E-mail: none

Tempus National Contact Point
Ministry of Education
EC Direction
Section B - Programmes
Mitropoléos Str. 15
GR - 101 85 Athens
Tel.: (30)1-3220950
Fax: (30)1-3220767
E-mail: ee@ypepth.gov.gr

Italy

Tempus National Contact Point
Ministero dell'Università e della Ricerca
Scientifica e Tecnologica
Dipartimento Relazioni Internazionali
Piazza Kennedy, 20
I - 00144 Roma
Tel.: (39)6-59912167
Fax: (39)6-59912967
E-mail: none

Ireland

Tempus National Contact Point
Higher Education Authority
Fitzwilliam Square 21
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Tempus Tacis
Project Coordinators' Feedback Sheet

Every attempt is made to provide useful practical information which will facilitate the work of a Project Coordinator or Contractor. In the following questions we invite you to provide us with suggestions for improvement so that future issues can be better tailored to meet your needs.

1. *What did you find particularly useful in the Handbook ? Please quote page numbers.*

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2. *Did you feel that any important issues were omitted or that greater emphasis could have been given to certain topics? Please explain further on the following lines.*

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* Please do not hesitate to send additional pages to accompany either of the above questions.

We thank you in advance for having taken the time to answer these few questions and we assure you that all comments will be taken into consideration.

Please send this completed Feedback Sheet by fax/post to:

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