Project Roadmap / Monitoring

EACEA A.3

Erasmus+ Erasmus Mundus Joint Master Degrees
Coordinators’ Conference
Brussels, 24-25 October 2017
Agenda

1. Preparatory year

2. Monitoring

3. E-reporting
Preparatory year

**Consortium Agreement**
- Internal co-operation agreement on academic, administrative, financial rules and procedures
- Before launching the first call for students' applications
- Send us a signed copy with the first technical report

**Student Agreement**
- Student's rights and obligations regarding academic, administrative, financial and insurance aspects
- Signed by both parties following student’s enrolment
- Send us a copy of the model with the first technical report

**Promotion**
- Design a joint promotion to attract the best students from all over the world
- Set up course website prior to the first call for students’ applications
- Check "Minimum requirements and recommendations for student selection & scholarship management« (Annex X to contract)

Preparatory year

Joint student selection
- Information on student application to be made available at the latest 3 months before the scholarship application deadline
- Encode selection results in the EMT no later than 15.04
- Inform students as soon as the selection process has been concluded
- Check "Minimum requirements and recommendations for student selection & scholarship management" (Annex X to contract)

Health and accident insurance coverage
- Must take effect when the student starts the journey to participate in the course (maximum two months prior to start of the course)
- Check "Minimum requirements for the health and accident insurance coverage of EMJMD students" (Annex IX to contract)

Student support
- Preparing students' arrival
  (visa/residence permit, accommodation, welcome guide)
- Students arrive!
  (bank account, registration at university and with local authorities, introduction trainings)
- Ready to start the course!
  (Academic support, language courses, cultural and social activities, counselling future career)
- Ready to continue with the course promotion and selection of the 2019 students!
Monitoring

General objectives

- Improve performance
- Achieve results
- Maximise impact
- Policy feedback

Specific objectives

- Project in line with EMJMD objectives and EU policy and priorities
- Compliance with EU rules

Assessment criteria = Award criteria
Types of monitoring

- **PREVENTIVE**: Beginning of project life time
- **ADVISORY/ CORRECTIVE**: During project whole life time
- **CONTROL**: After project completion

**Types of monitoring**

- **DESK MONITORING** (Brussels HQ)
- **REMOTE MONITORING** (Brussels/spot)
- **FIELD MONITORING** (on the spot)

Linked and complementary
Preventive monitoring

PURPOSE

- Advice and guidance
- Information on rules & procedures

ACTIVITIES

- Coordinators' conference and bilateral meetings
- Correspondence
- Technical report

ensure sound project implementation
Advisory/corrective monitoring

PURPOSE

- Check progress and provide guidance
- Ensure compliance with EU financial and administrative rules
- Apply corrective mechanisms if needed
- Identify good practices and potential success stories

ACTIVITIES

DESK MONITORING
- CORRESPONDENCE
- INTERIM REPORTS
- STUDENT VOICE

FIELD MONITORING
- VIDEO CONFERENCE
- AD-HOC VISITS OF BENEFICIARIES TO THE AGENCY
- MONITORING VISITS
Advisory/corrective monitoring

Monitoring visits - Actors

AGENCY ACTORS:
- Project Officer
- Financial Officer

PROJECT ACTORS:
- Coordinator's contact person
- Consortium partners
- Administrative/financial/international offices
- Students and scholars
- Senior management in the University, etc.

To hear the views of key project actors
Advisory/corrective monitoring - Monitoring visits

**Timing**

- Normally during mid-term phase (2nd/3rd year)

**Location**

- On the spot – Organised around a key project event

**Feedback**

- Feedback to the beneficiaries – to be followed up via desk monitoring
Advisory/corrective monitoring

Other Monitoring Visits

- Projects facing difficulties
- Audits
- Projects which are potential best practices
- Joint institutional visits involving other Erasmus+ units of the Agency
Control monitoring

PURPOSE

• Check achievement of objectives, results, impact and sustainability
• Check compliance with EU rules and procedures
• Identify good practices and potential success stories

ACTIVITIES

DESK MONITORING
FINAL REPORT

FIELD MONITORING
SPECIAL MONITORING VISITS:
BEST PRACTICES PROJECTS
AUDITS
e-REPORTING

• E-report accessible via the Participant Portal

• Operational part
• Financial part

Supported by annexes, including EMT Print-outs
Reporting milestones

1. First pre-financing payment (25% of the grant)
2. 2nd pre-financing request (50% if 70% of previous pre-financing payments spent)
3. 3rd pre-financing request (25% if 70% of previous pre-financing payments spent)
4. 4th pre-financing (only if grant amount was not paid in full in previous pre-financings)
5. Technical Report
6. Final Report

(Progression along an arrow, each step marked with a blue circle)
# Report Calendar

<table>
<thead>
<tr>
<th>Report type</th>
<th>Without preparatory year</th>
<th>90 ECTS</th>
<th>120 ECTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd pre-financing request</td>
<td>15.10.2018</td>
<td>30.06.2019</td>
<td>31.08.2019</td>
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<tr>
<td>3rd pre-financing request</td>
<td>29.02.2020</td>
<td>30.09.2020</td>
<td>28.02.2021</td>
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<td>4th pre-financing request</td>
<td>No later than one year before the end date of the project</td>
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<tr>
<td>Final Report</td>
<td>No later than 60 calendar days after the end date of the project</td>
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Some tips for reporting

- Complete
- Substantial
- To the point
- Avoid repetitions
- Accurate
- Coherent
- Up-to-date
- Timely submission
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