

# CAPACITY BUILDING



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European  
Commission

## Asia Regional Workshop

# Operational Management & Financial Management

*Grant Holders Meeting CBHE 2021*

# How to manage your project: key points



# Prerequisites to good project management

- Ensure the commitment of your institution
- Be aware of your role in the project:
  - Partner Country HEIs active involvement & ownership**
- Read carefully all project contractual and financial documents
- Find out about your national constraints/legislation & include them in Partnership Agreement
- Structural projects: Increase the involvement of the Ministry of Education

# Roles of Partners & Coordinator

## Coordinator

- **Oversees the implementation** of activities
- **Manages the funds** of the project
- Ensures the **respect of CBHE rules**
- **Central communication point** with project partners and external stakeholders
- In **regular contact** with the EACEA (through Project Off.)
- Submits **reports and payment requests** to EACEA

## Partners

- **Implement activities** under their responsibility
- **Support the coordinator** (e.g. providing information and supporting documents for reporting on time !)
- **Work in full transparency** with the coordinator (inform of any changes / delays)
- **Contribute to the dissemination** of the project results in their organisation, community and/or region

# Communication & support

## With EACEA Agency

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

## With your EU Delegation in Partner Country

- Inform of project events

## With National Erasmus+ Office

- Support to projects; experience in Tempus/Erasmus+ projects

# Changes to the project

## Administrative changes (PIC)

- Address, Legal name, Legal Status, Legal representative, etc.

## Functional changes

- Work programme, equipment, eligibility period
- Partnership (withdrawal, addition, replacement)
- Budget: 10% rule
- Coordinating institution contact person, bank account
- Reporting deadline

## How to proceed

- Inform coordinator asap, who will in turn inform the Agency
- At the very latest 1 month before the project's end date
- The Agency will ask for supporting documents
- If the change is accepted: an amendment will be carried out

## Prerequisites for effective implementation

- Quality assurance strategy
- Dissemination strategy
- Sustainability and exploitation strategy

## Publicity / Visibility rules

Project publications and results:



Co-funded by the  
Erasmus+ Programme  
of the European Union

- Must display Erasmus+ Logo
- Must mention this sentence: "*Co-funded by the Erasmus+ Programme of the European Union*"

Include disclaimer:

- "This project has been funded with support from the European Commission. This publication [communication] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein".
- See Agency's website: [https://eacea.ec.europa.eu/about-eacea/visual-identity\\_en](https://eacea.ec.europa.eu/about-eacea/visual-identity_en)



# Financial management key points



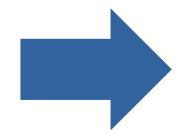
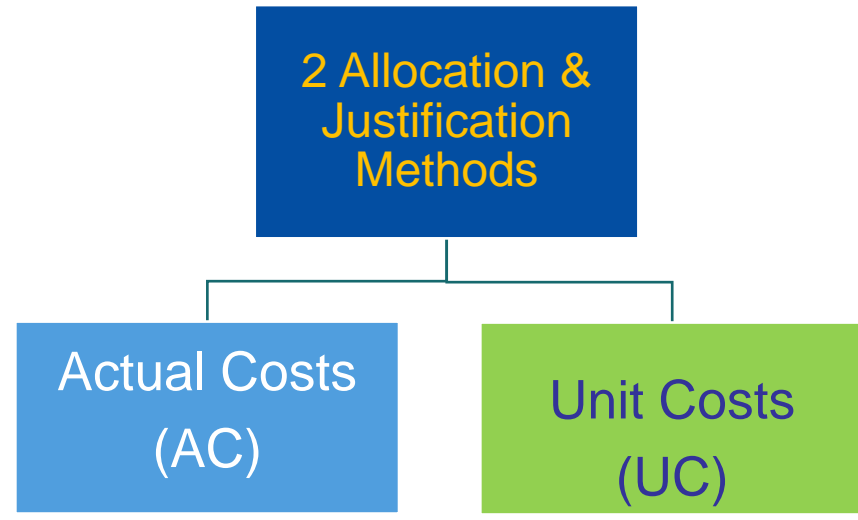
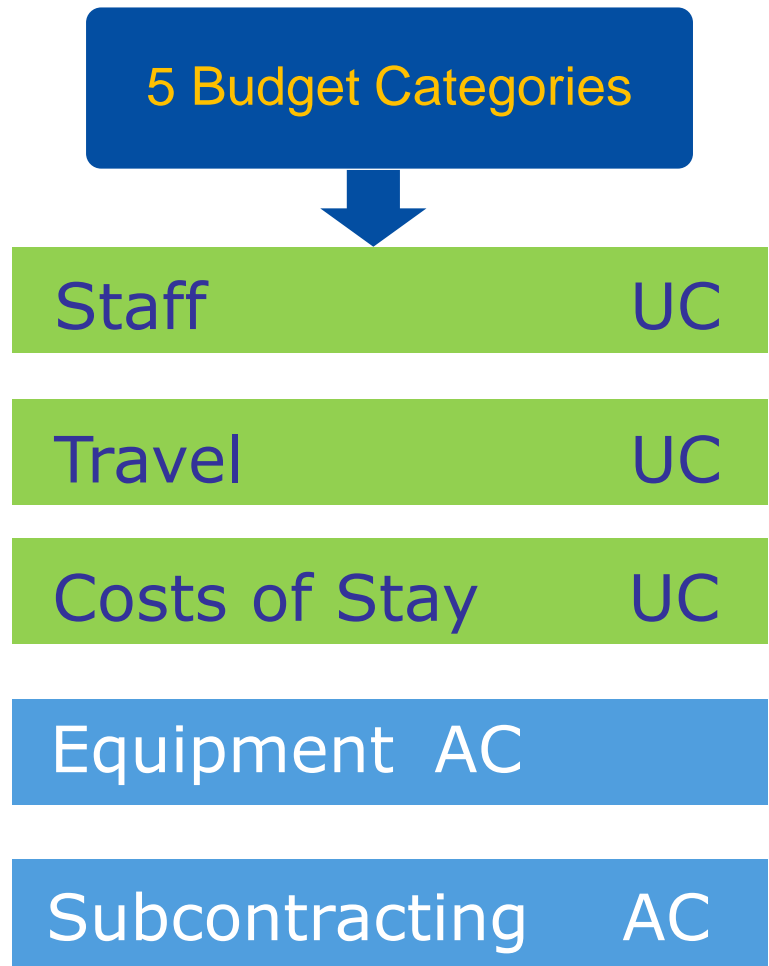
# Few rules are new in the 2020 Grant Agreements

- Art I. 4.6
- Reporting period 1: from month 1 to month 21
- Reporting period 2: from month 22 to month 36
- No EUR accounts = **two exchange rates.**
- **Start 15-11-20/15-01-21**

- Request of the second pre-financing (40%) – Art. I. 4.2
- It must be submitted within 60 days after the end of the Reporting period 1

- Each partners must submit an audit certificate if the total budget awarded (See your Excel file in the application) in actual costs (Equipment + Subcontracting) is higher than 60.000 €. This is quite rare but it happens.

# Project Budget controlling and reporting



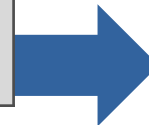
# Reporting and documents for Unit Costs

<b>Budget Headings</b>	<b>Supporting documents</b>
<b>Staff</b>	<ul style="list-style-type: none"><li>▪ Formal employment contract</li><li>▪ Staff convention</li><li>▪ Time sheets</li><li>▪ Agendas</li><li>▪ Attendance / Participant lists</li><li>▪ Tangible outputs/products</li></ul>
<b>Travel and Costs of Stay</b>	<ul style="list-style-type: none"><li>▪ Individual Travel Report (ITR)</li><li>▪ Invoices, receipts, boarding passes</li><li>▪ Agendas</li><li>▪ Attendance / Participant lists</li><li>▪ Tangible outputs/products</li></ul>

# Reporting and documents for Actual Cost

Budget Headings	Supporting documents
Equipment	<ul style="list-style-type: none"><li>▪ <i>Invoices</i></li><li>▪ Bank statements</li></ul>
Sub-contracting	<ul style="list-style-type: none"><li>▪ <i>Subcontracts</i></li><li>▪ <i>Invoices</i></li><li>▪ <i>Bank statements</i></li></ul>
	<ul style="list-style-type: none"><li>▪ <i>Tendering for both : &gt; 25.000 € = 3 quotations from different suppliers &gt; 134.000 €</i></li><li>▪ <i>In conformity with national legislation</i></li></ul>

- Do not assume that all activities described in your project application are automatically eligible
- Before implementing any activity, please first check that this activity is ELIGIBLE:
  - Grant agreement
  - Programme Guide



## Key 'take aways'

### Prevent future problems:

- Make sure your project goals and activities are clear
- Learn & understand the CBHE rules

### Real partnership:

- Requires genuine engagement and conversations
- Take your place in the partnership (rights & obligations)
- Be a fan and Ambassador of Your Project!



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