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# Capacity Building in Higher Education Project management rules

ENEMLOS kick off meeting  
24-25 February, 2020, Hotel Avala, Budva

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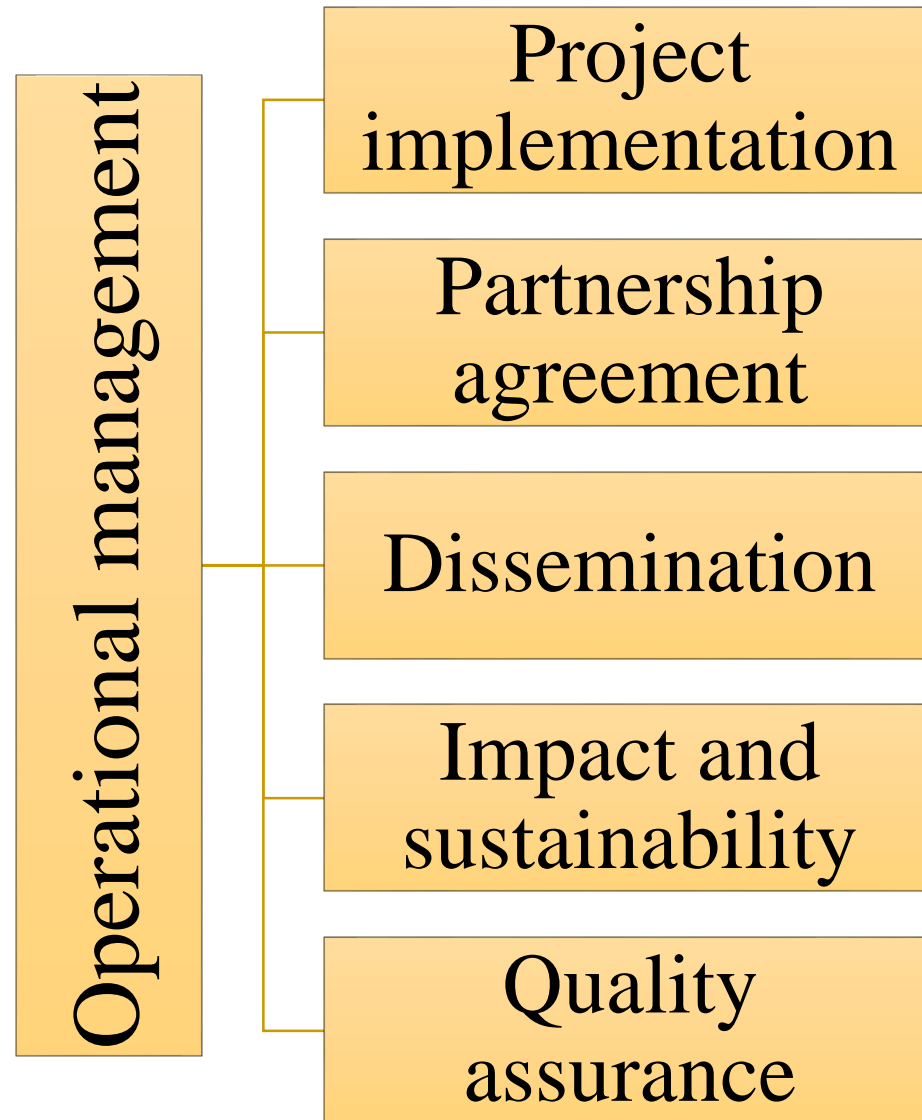


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# Operational management



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## **Kick off meeting: what are the main expected results?**

Partnership  
Agreement

Establishing project  
management bodies



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## Project management bodies: clarification of the roles

### Coordinator

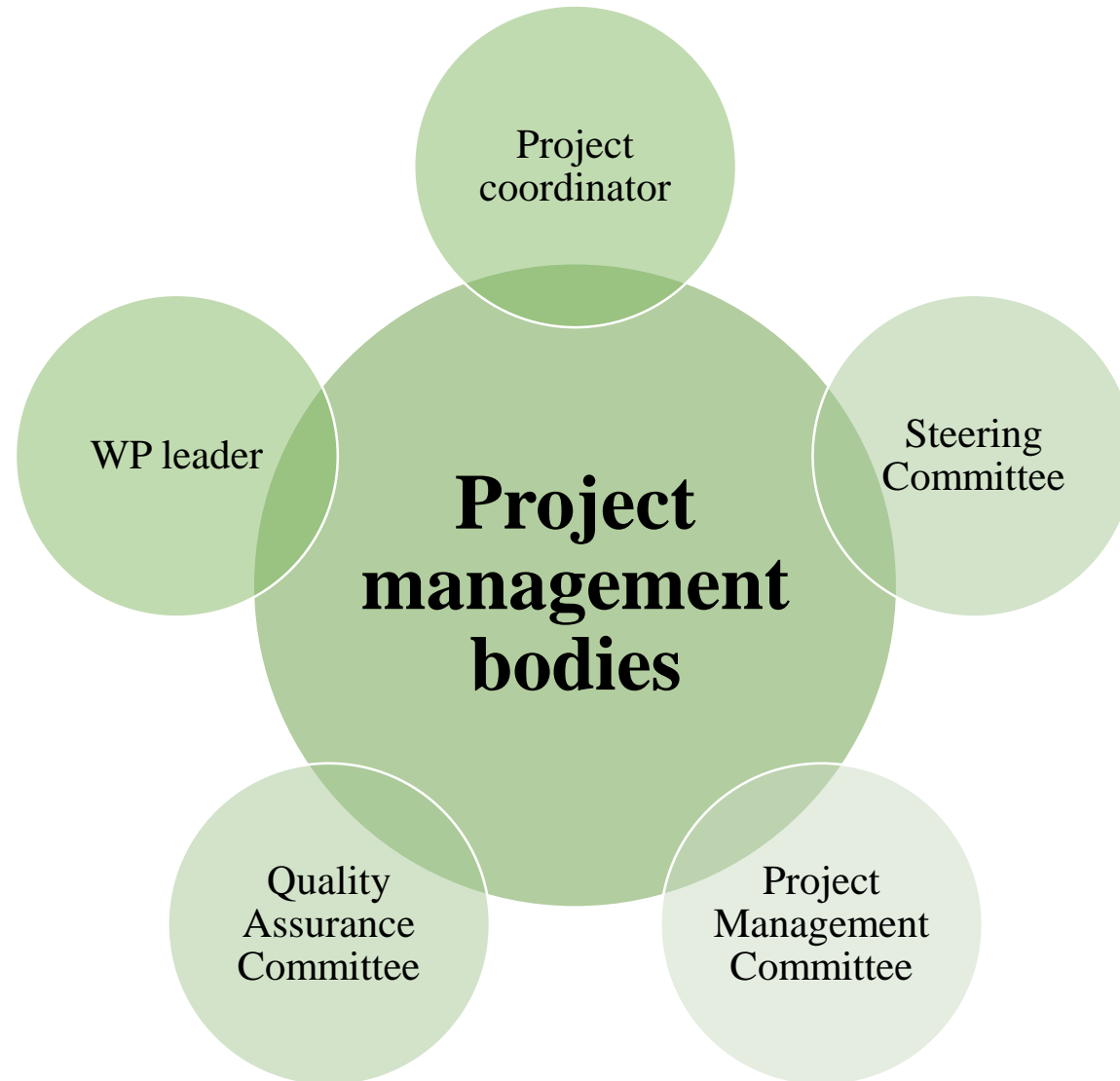
- Oversees the implementation of the activities
- Manages the funds and ensures respect for CBHE rules
- Central communication point
- Regular contact with EACEA (project officer)
- Submits reports and request for payment to EACEA

### Partners

- Implements activities under their responsibility
- Supports the coordinator (e.g. providing information and supporting documents for reporting on time)
- Work in full transparency with the coordinator
- Contribute to the dissemination of the project results



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## Partnership agreement

Content of the partnership agreement covers all aspects of the project:

- Partners rights and obligations
- Partners roles and responsibilities
- Financial management
- Project management and decision making process
- Reporting mechanisms
- Conflict management mechanisms
- Communication strategy
- Sustainability strategy
- Any other relevant topic for the efficient implementation of the project.

*Note: understand the rules which will apply to you and have a voice in the decision-making process.*

## Partnership agreement

- The Agency provides a template with core elements that might help to draw the Partnership Agreement;
- Must be negotiated with partners and signed by the legal representatives;
- A signed copy of Partnership Agreement to be provided by e-mail to the Agency **within 6 months** of the signature;





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## Changes to the project

- Administrative changes
- Work programme
- Equipment
- Eligibility period
- Partnership
- Budget

*Certain activities and/or expenses do not require a formal change of the contract (amendment) but are subject to a written authorisation of the Agency to consider them eligible and/or reimbursable.*



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## Change of the eligibility period

- An extension of the eligibility period may possible if approved by the Agency;
- To be requested at latest one month before the end of the eligible period;
- Extension of a maximum of 12 months;
- The extension does not impact the grant awarded;
- Provide a clear explanation on the request why the extension is necessary;



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## Change in the budget breakdown

- Amendment request: the 10% rule;
- Justify the need for this change and send an updated budget breakdown in order to request such an amendment;
- Note: under no circumstance an amendment to the budget can lead to an increase of the grant amount specified in the Agreement;



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## Change in the partnership composition

- Addition or withdrawal of one or more beneficiaries;
- By removing and/or adding a new beneficiary, all the eligibility and selection criteria originally applied are still fulfilled.



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## Changes in the equipment

- Eligible equipment – directly relevant to the project objectives;
- Equipment cannot be purchased for non-higher education institutions;
- Must be installed as soon as possible;
- Equipment must bear an Erasmus+ sticker;
- Changes of the equipment: minor and significant changes;
- For significant changes, prior written authorization from the Agency should be given;



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## Implementation: what can be considered a successful project



Quality  
implementation



Sustainability



Innovative  
character

## Institutionalization

Institutionalization of the project is precondition for its success, it ensures sustainability and facilitates the achievement of project goals.

- At HEI level:
- Academic authorities
- Finance department
- International office
- Students

## Project strategic documents

An effective implementation requires:

- Communication plan
- Quality assurance strategy
- External dissemination strategy
- Sustainability and exploitation strategy



## Dissemination

- Draft the Dissemination Strategy;
- Define the target groups;
- Identify the objectives;
- Define the impact and measure it;
- Involve all project participants;
- Dissemination tools: project website, project flyers/brochures/leaflets, social media, media releases, newsletters, public events.

### Publicity obligations

- Project outputs must indicate the EU funding. All materials must carry the Erasmus+ logo and mention “Co-funded by the Erasmus+ Programme of the European Union”.



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

- Upload the results of the project to the Erasmus+ Dissemination Platform: <https://ec.europa.eu/programmes/erasmus-plus/projects>

## Quality assurance

- Monitor process (methodology and progress) and results (final outputs);
- Asses the compliance of activities and results with the project objectives;
- Draft the Quality Plan from the start;
- Define the indicators and tools;
- Internal and external quality review;
- External expert sub contraction;
- To give an authentic and useful opinion, the external expert must be a specialist of the field dealt by the project;

## Impact and sustainability

- Focus on enhancing capacities of the partner institutions and individuals;
- Address key stakeholders to ensure their support to exploit the results beyond the end of the project;
- Measure the impact (expected and real);
- Ensure multiplier effects inside and outside your institutions at regional and national level;
- Attract co-funding and other forms of support

## Penalties in the case of poor, partial or late implementation

In a total of maximum 100 points, the reduction of the grant will be of:

- 25% if the project scores at least 40 points and below 50 points;
- 35% if the project scores at least 30 and below 40 points;
- 55% if the project scores at least 20 and below 30 points;
- 75% if the project scores below 20 points.



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# Financial management



## Payment modalities

1<sup>st</sup> pre-financing: 50%

- Upon entry into force the GA

2<sup>nd</sup> pre-financing: max 40%

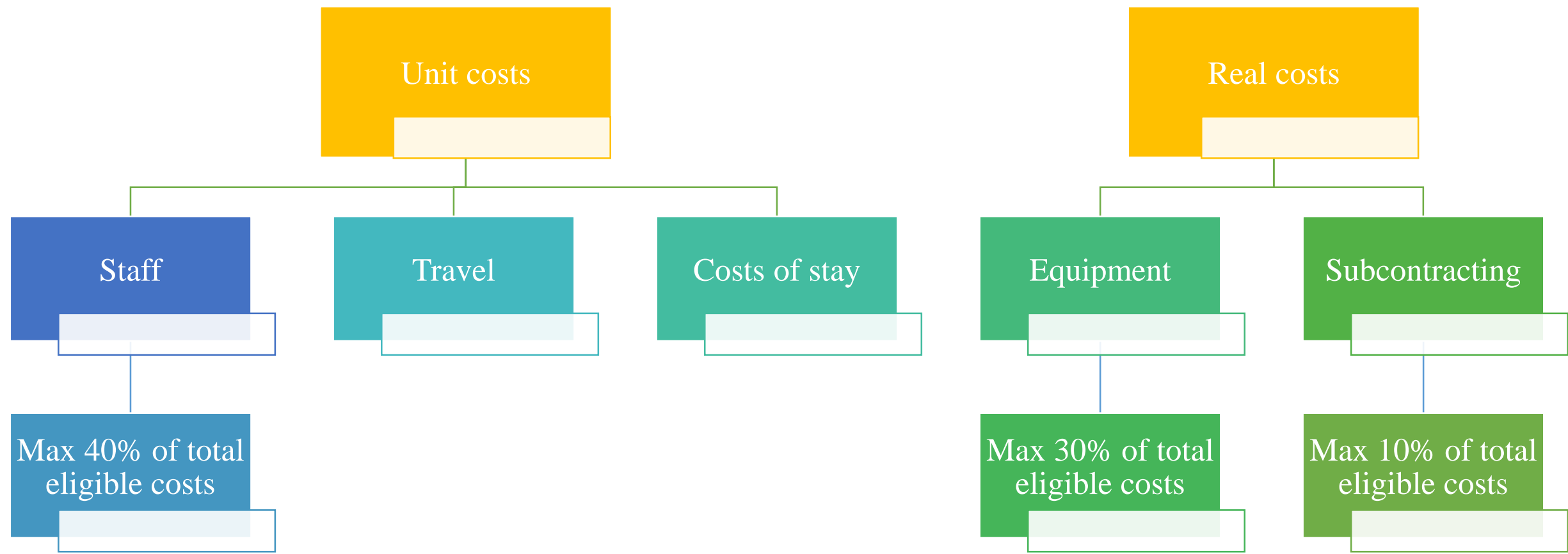
- Request must be submitted within:
- 6 months from end of period 1 (3y projects)
- 3 months from end of period 1 (2y projects)
- Amount will be 40% of grant awarded or less if actual budget spent is below 70% of 1<sup>st</sup> pre-financing paid

Balance: max 10%

- At final report stage



## Budget categories



## Co-financing principle

- According to the European Union Financial Regulation grants shall always involve co-financing;
- Types of expenditures not foreseen in the budget of the grant (bank fees, translation if not sub-contracted, overhead costs etc.);
- Co-financing is not taken into account for the final calculation of the grant;
- Co-financing contribution will not need to be justified, except for statistical purposes only.





## Unit costs and real costs meaning

### Unit costs

Fixed contribution multiplied by number of units based on “Triggering events” (activities/outputs)

Justification of the grant:

- Based on activities implemented;
- Need to prove the fact that the activity has taken place

### Real costs

Expenses actually incurred documented and justified with corresponding level of cost

Justification of the grant:

- Based on costs actually incurred;
- Proof of expenses (invoices, proof of payment, etc.)

## Unit costs

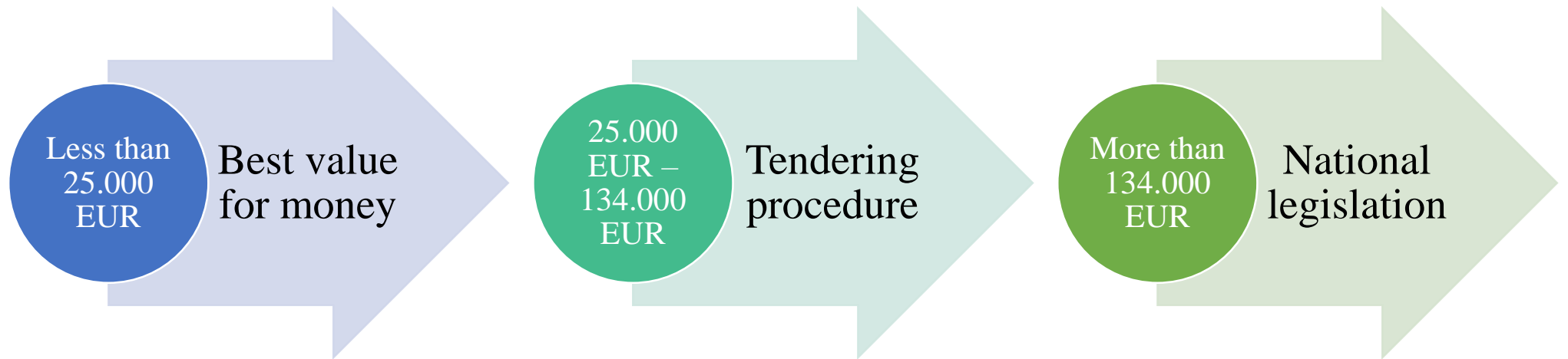
	Staff costs	Travel costs and costs of stay
Definition	Contribution to the costs of staff performing tasks which are directly necessary to achieve the objectives of the project	Travel/stay for staff students participating in eligible activities related to the achievement of the project
Calculation	3 variables: <ul style="list-style-type: none"> <li>• Staff category;</li> <li>• Country;</li> <li>• Number of days</li> </ul>	3 variables: <ul style="list-style-type: none"> <li>• Travel distance for travel costs;</li> <li>• Duration for costs of stay;</li> <li>• Type of participant (staff/student)</li> </ul>
Supporting documents	<ul style="list-style-type: none"> <li>• Joint declaration;</li> <li>• Time sheets;</li> <li>• Proof of formal contractual relationship;</li> <li>• Evidence justifying workload and activities/outputs (e.g. attendance lists)</li> </ul>	<ul style="list-style-type: none"> <li>• Individual travel report;</li> <li>• Supporting documents (e.g. travel tickets, boarding passes, invoices, receipts, proof of attendance in meetings, agendas, tangible outputs/products, minutes)</li> <li>• <u>For exceptional costs – proof of the actual cost of the travel</u></li> </ul>

## Real costs

	<b>Equipment</b>	<b>Sub-contracting</b>
<b>Definition</b>	Relevant to the objectives of the project and foreseen in the application	Implementation of specific tasks, by third party, to which a contract is awarded by one/several beneficiaries (e.g. IT courses, language courses, translation services, web design and maintenance, etc.)
<b>Supporting documents</b>	<ul style="list-style-type: none"> <li>• Invoices and proofs of payment;</li> <li>• Expenses exceeding 25.000 EUR: tendering procedure and three quotations from different suppliers;</li> <li>• EUR 134.000: procedure according to national legislation;</li> <li>• Registration in the inventory</li> </ul>	<ul style="list-style-type: none"> <li>• Invoices, subcontracts and proofs of payment;</li> <li>• Expenses exceeding 25.000 EUR: tendering procedure and three quotations from different suppliers;</li> <li>• EUR 134.000: procedure according to national legislation;</li> <li>• Travel activities of subcontracted service provided: copies of travel tickets, boarding passes, invoices and receipts</li> </ul>



## Tendering procurement





THANK YOU FOR YOUR ATTENTION!

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