



Promoting behaviour change

CHANGE Plus – Kick-Off Meeting WS 0

TERRE DES FEMMES, Berlin

3 - 4 March, 2016

Project Coordination

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WS 0

Management & Coordination

- Kick-Off Meeting (BRU and BER)
- Reporting and Project Monitoring
 - Financial Management of the grant
 - Interim and Final Report



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Report from Kick-Off BRU

- Management of the Grant Agreement & General conditions
- Cooperation culture
- Management Guide



Grant Agreement

- Multi-Beneficiary grant agreement, conditions are **binding for all partners**
- **Details in Management Guide for Action Grants**
- Joint liability of all partners
- Grant Agreement ranks higher, but bilateral contract is a good practice
- Ownership of results (reports, property rights) are property of the beneficiaries but EC can make free use of it. Intellectual property agreement should be signed in addition
- EU-funding Visibility "Co-funded by the Rights, Equality and Citizenship Programme by the European Union" and EU Logo



Cooperation Culture

- Project Coordinator communicates regularly to the EC and partners, EC to be updated regularly
- Amendments in Annex 1 and Budget need approval by EC (e.g. Staff changes)
- Partners communicate regularly to Project Coordinator
- Close (every-day) communication between all partners needed and crucial!
- For important decisions all partners will have to be consulted
- Sense of partnership, joint ownership of the project



Reporting and Project Monitoring

- Reporting to EC by Project Coordination
- Quarterly reporting by partners on implementation of activities and financial execution
- “Monitoring visits” by TDF
- Partner organisations monitor activities of CHANGE Agents and Champions (reporting form)



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Reporting to EC

Reports to be submitted by the co-ordinator in paper and electronically

- **29 January 2017** technical implementation report and a summary financial statement
- **14 March 2018**: final technical implementation report and financial statement
- **Partners report quarterly** to Project Coordinator
 - 15th of April 16
 - 15th of July 16
 - 15th of October 15
 - 15th of January 17 (midterm report)
 - asf
- Requirements for reporting to be found in the **Guide for Action Grants**
http://ec.europa.eu/justice/grants1/files/2014_general/guide_for_action_grants_2014.pdf



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Activity Reporting Template

⇒ **Workstream 1: Title:**

I. Activities
Implemented activities:
1.
2.
Activities delayed or not implemented:
1.
2.
Unforeseen activities:
1.
2.
II. Output(s)
Output 1:
Output 2:
Output 3:
Difficulties or Challenges occurred during implementation:
How did you solve them:



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Reporting Quantitative Indicators

- Analytical activities;
- Training activities;
- Mutual learning, exchange of good practices, cooperation;
- Awareness-raising, information and dissemination.



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Eligibility of Costs

- Incurred **during the duration** of the project (**15th Jan 2016 – 14th Jan 2018**)
- Paid by your organizations (not by other parties)
- Identifiable & verifiable (recorded in your organization's accounting records)
- All expenditures **MUST be supported** by adequate documentation
- Any expense not documented/adequately supported & not registered in the accounts will not be taken into account
- **Directly connected to the activities of the project** & indicated in the estimated budget Annex 3
- The costs must be reasonable & in accordance with the **best value of money** (cost-effectiveness) assure & document the best value for money especially in cases of subcontracting/ working with service providers (e.g. translators, room rentals)



Budget Categories in CHANGE Plus

- A Staff Cost
- B Travel and subsistence
- E Other Cost



Reporting Staff Costs - A

- Only the **actual time** devoted to the project may be charged as personnel costs
- Staff costs should be calculated on the basis of the **actual gross salary** or wages plus obligatory **social charges** and any other statutory costs
- Time keeping is a **must for permanent staff and recommended for staff working for only this project**
- Staff employed **explicitly for the project**: contract should make specific reference to the project and indicate the tasks of the employee, the duration of the employment, the time allocated to the project and the relevant remuneration rate (monthly/daily/hourly).
- Formula to calculate the staff costs in Management Guide and template available



Documentation of Staff costs

Supporting documents

- contract with the organisation of staff
- **secondment letter** with specific indication of tasks, reference to the project, and the percentage of working time allocated to the project; to the hourly/daily rate;
- monthly salary slips (or annual)
- proof of payment
- time sheets for all staff working on the project indicating hours worked for CHANGE Plus
- Correct calculation formula

Note: Staff must be registered in the payroll and in the accounting system of the organisation! The salary should be paid by bank transfer.



Supporting Docs -Time sheets

- Reference to the project CHANGE Plus
Just/2014/RDAP/AG/HARM
- Name of the employee
- To be kept on monthly basis
- Number of time units (hours and days as in the budget) worked on the project
- Number of time units (days or hours) worked on other grants/activities
- Total number of time units (days or hours) worked.
- Details of the tasks performed for the project
- Date and signature of the employee
- Date and signature of the project manager

→ **Signed copies to be scanned and uploaded to the Dropbox provided by TDF**



Time sheet Example

Time-sheet					
Name of beneficiary/co-ordinator					
Name of staff member					
Staff member employed to fulltime or part time					
Co-ordinator					
Project name					
Time unit					
Include absence with duration of the reasons below					
Calendar Day	Time spent working on EU project X Kilobyte 01 in reference	Time spent working on EU project Y Kilobyte 02 in reference	Time spent working on EU project Z Kilobyte 03 in reference	Other activities	Total hours (including overhead)
1					0
2					0
3					0
4					0
5					0
6					0
7					0
8					0
9					0
10					0
11					0
12					0
13					0
14					0
15					0
16					0
17					0
18					0
19					0
20					0
21					0
22					0
23					0
24					0
25					0
26					0
27					0
28					0
29					0
30					0
31					0
Summary for this month	0	0	0	0	0

Absence	
Weekend	WT
Sick leave	SL
Public holidays	PH
Annual holidays	AH
Other absence	OA

Summary of leave	

Date and signature of staff member

Date and signature of Project Manager/Coordinator/Responsible



Reporting Travel & Subsistence Cost - B

- Only travel directly related to the activities in the project can be charged to the project, as budgeted
- Per diem rates** are only eligible if usual practice by beneficiaries before the start of the project (evidence needed), otherwise against real costs and receipts
- When filling out travel costs you should indicate:
 - the reason for travelling (e.g. Second Project Meeting, Study visit, etc.)
 - the places of origin and destination
 - the means of travel used
 - the names of the people who have travelled
- All supporting documents need to be kept
- ➔ Scanned copies to be uploaded into dropbox



Supporting Doc – Travel Cost

Travel and subsistence costs for all meetings

- Copies of travel ticket (airplane, train, bus, etc), including boarding passes
- Copies of invoice for flight or rail tickets (if bought through internet, email of confirmation)
- Travel by car: reimbursement claim, receipts
- Proof of accommodation by hotel invoice
- Receipts related to food and beverages, local transport and other expenses;
- **Attendance list signed** by the participants (for all partner meetings, Change Agents training and meetings and conferences). Pictures recommended
- Reimbursement claim by person to organisation
- Proof of payment by organisation



Per diem rates

→ "per diem rate" only eligible if usual practice and documented before the start of the project . Preferable is real costs based on bills/receipts for food, beverages, local travel in the place of mission. **In any case, keep all receipts.**

•Per diem rate for **Partners Meetings**

Per diem rates of partners will be used **by the host** to cover meals during the meeting. Partners per diem is accordingly reduced by 15% breakfast, 30% lunch and 30 % dinner (evidence-based, by organisation hosting the meeting, per diem cannot be claimed twice)

•Per diem rate for **CHANGE Agent Meetings**

(to be spent by the organisation, reimbursement of costs only against bills and receipts, includes costs for local travel, food/beverages and childcare costs)

Supporting documents are needed (signed attendance list)



Reporting – Other Direct Cost

- Budget category E for other expenses, such a publications for dissemination, conferences and seminars, training materials, catering for events, allowance fees, moderator fee, subcontracting of translation services
- Invoices, receipts for all expenses, directly linked to activities in the forecast budget
- Best value for money (get different offers for translation/layout/etc. services)



Documentation of Other Costs

Publications/Translation services	<ul style="list-style-type: none"> -Best value for money (collect several offers) -Tender procedure should be rationale and traceable -No conflict of interest - All Outputs have to implement the EU visibility rules (disclaimer and EU logo)
Training material	Copy costs
Events (behaviour change activities)	Invoices from restaurants, room rental costs, pictures, signed attendance list, written reports from Change Agents. No double reimbursement (if catering is offered, subsistence must be reduced)
Allowance fee for change agents	<p>Contracts with Change Agents to be signed</p> <p>Payment by bank transfer, linked to activities</p> <p>Reports by Change Agents and evaluation forms requested</p> <p>Timelines of payments to be agreed in contract</p> <p>→ Scanned copies, uploaded in the dropbox</p>



Indirect costs

Indirect costs
7%



- Indirect cost items cannot be included in the Financial statement
- maximum of 7% of direct eligible costs can be claimed in the **final** report
- the costs do not need to be supported by accounting documents, but they do have to be explainable in case of control.



Exchange rate EUR - UK

- In project reports all amounts must be expressed in EUR
- Where the accounts are held in the national currency the beneficiary must declare the expenditure at the monthly accounting rate established by the Commission and published on its website
<http://ec.europa.eu/budget/infoureuro/index.cfm>
- Beneficiaries have to **apply the exchange rate valid on the day when costs were incurred**
- In cases where the EURO rates fluctuates significantly then the beneficiary must clearly identify what exchange rate or rates have been used and provide a detailed explanation



VAT is a Non-Eligible Expenditure

- VAT- Value Added Tax
- Non-eligible unless the organisation who incurred the cost can show that it is unable to recover it (by means of a certificate issued by the national tax authority of the Beneficiary who has incurred the cost clearly stating that the beneficiary in question cannot recuperate VAT);



20%- Rule

- Deviations between budget headings up to 20%
- Total figure for the **whole budget**, not for the individual beneficiaries
- To be justified and explained in final report
- **Project Coordinator** monitors budget spending
 - Allowed if e.g. number of participants increase in training
 - **Questionable is increase budget heading A**
 - Only costs consistent with Annex 1



Own Contribution

- Income to the Project (donations, other sources of funding, but **not** contribution in-kind)
- To be used for costs as calculated in forecast budget
- No detailed explanation of source of contribution needed
- Around 20% of the Budget



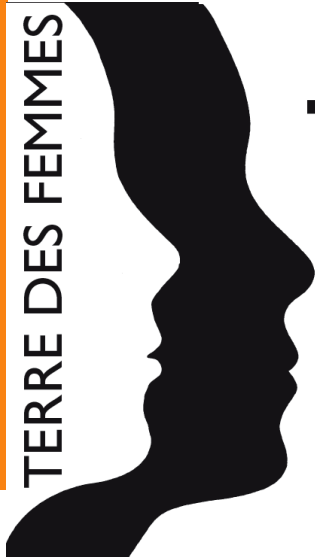
Keep in Mind

- Management Guide is our reference tool
- Provide all copies of receipts **quarterly** (dropbox)
- But keep all originals for the next 7 years
- Audits may happen 5 years after the final payment, they check originals
- **Pre-financing by partners** is required as well as own contribution → **start early to raise funds**
- Last payment is a maximum amount and not guaranteed, depending on acceptance of final report
- Please ask us anytime if you need help!



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Thank you for your attention!

TERRE DES FEMMES e.V.

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