



Promoting behaviour change

CHANGE Plus – 2nd Coordination Meeting

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Amsterdam, the Netherlands
Project Coordination
change@frauenrechte.de

Linda Ederberg



Reporting and Financial Management



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- Quarterly Reports by Partner
- Interim Report to EC (29 January 2017)
- Financial Management:
 - Eligibility of Costs
 - Supporting Documents



Quarterly Reports from Partners



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- Please respect deadlines!
- Narrative reporting:
 - Partners are responsible to quarterly document all project activities (cross-check with financial report!)
 - Lack of information specifically for WS 4; documentation of dissemination activities important!
- Financial reporting:
 - Supporting documents missing → costs are not considered eligible!
 - Staff cost calculation missing



Interim Report to EC



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- 29 January 2017 narrative implementation report and a summary financial statement
- Partners to report to Project Coordinator
 - Next quarterly report on 15th of October 16
 - 9th of January 17 (with anticipated costs for January 17)
- TDF to summarize findings in the report
- 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) http://ec.europa.eu/justice/grants1/files/2014_general/guide_for_action_grants_2014.pdf



Narrative Interim Report



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- **Template** to be completed with (interim) results of the project
- **Achievements after 12 months:**
 - e.g. 12 Change Agents recruited, give details on the selection process, profiles
 - 7 training sessions completed, give details
 - Country brochure disseminated to xyz key professionals (proof/evidence needed: how was it done?)
 - Training Manual downloaded xyz
- **Main problems/difficulties** in the implementation (e.g. only 11 Change Agents, because..)
- **Changes in timeline or budget**
- Visibility of EU funding
- **Dissemination of results (compilation of articles etc, media coverage)**
- Links and references to financial statement needed!



Final Report: Quantitative Indicators



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



Financial Management



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- Eligibility of costs
- Supporting documents for Staff (A), Travel and Subsistence (B) and other costs (E)





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)





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Project Monitoring

- Quarterly reporting by partners on implementation of activities and financial execution are checked
- “Monitoring visits” by TDF
- Partner organisations/trainers monitor activities of CHANGE Agents and Champions (reporting form)





Staff costs

Supporting documents

- Working contract with the organisation
- **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 salary slip)
- proof of payment (bank statement!)
- Signed time sheets for all staff working on the project indicating hours worked for CHANGE Plus (template available)
- Daily rate of staff available
- Correct calculation formula: staff cost calculation sheet

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





Travel Costs

Supporting documents

- Allowance form for (business) travel
- 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
- Taxi is not eligible (only late night and early morning)
- 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).
- Reimbursement/Cost claim by person to organisation
- Proof of payment by organisation



Examples for Travel Costs



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- Change Agent in Berlin: Travel Cost to 2nd training, 5, 40 EUR
 - Train tickets as originals submitted with cost claim by Change Agent to Trainer (Signed by both) ✓
 - Change Agent contract available and signature on participant list for the 2nd training ✓
 - Proof of payment by organisation TERRE DES FEMMES to Change Agent (bank statement) ✓



Subsistence and Per diem rates



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→ “per diem rate” only eligible if usual practice and documented before the start of the project.

In any case, keep all receipts.





Examples for Subsistence Costs

Subsistence for Partners Meetings

Per diem sum to be used by the host organisation (TDF, FSAN, Coventry, End-FGM) 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

- receipt, invoice from catering company ✓
- Signed participant list ✓
- Full per diem cannot be claimed twice ✓





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Examples for Subsistence Costs

Subsistence for Change Agent Trainings

- Organisation to spend per diem sum for lunch/coffee ✓
- No per diems to be paid to Change Agents ✓
- Around 20 EUR per day per person (check budget) ✓
- Signed participant list needed ✓

Coordinator	Work stream 2	Change Agent Training Berlin (Training Module: 1-14) in 7 days (8 hours a day)	per diem	20,00	56,00	1.120,00	6 Change Agents, project worker and Intern
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Other Direct Cost

- Budget category E for other expenses, such as
 - printing of publications for dissemination
 - conferences and seminars
 - printing of training materials
 - allowance fees for Change Agents
 - subcontracting of services
- All items must be directly linked to the forecast budget ✓
- Best value for money to be sought: get min. 3 offers > 5000 €, take minutes of selection procedure ✓
- Tender procedure should be rationale and traceable ✓





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Examples: Events by Change Agents

- 90 EUR per event for the group of people (around 10)
 - Invoice for room rental ✓
 - Invoice from restaurant ✓
 - Signed attendance list ✓
 - Report by Change Agent
 - In addition 20 EUR for the organising Change Agent (Subsistence, against evidence)
- ➔ But no double reimbursement (if catering is offered, subsistence must be reduced)





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Examples: Allowance fee for Change Agents

- Amounts for Change Agents differ acc. to national conditions
- Contracts with Change Agents to be signed ✓
- Payment by bank transfer ✓
- Reports by Change Agents for activities ✓
- Signed attendance lists for trainings and exchange meetings ✓





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Own Contribution

- Income to the Project (donations, other sources of funding, but not contribution in-kind)
- 20% of the costs as calculated in forecast budget (**often misunderstood!**)
- No detailed explanation of source of contribution needed

Have you started to raise funds?





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Other Issues

Cooperation culture in the project

- More regular communication needed! Difficult, if only one person per organisation is available
- Partners to communicate between each other
- Trainers/Facilitators to start own communication flow

Budget responsibility

- Monitor your activities and budget
- Communicate with coordinator
- Underspensing is a problem, too!





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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 for completeness and are in the position to claim money back
- Last payment is a maximum amount and not guaranteed, depending on acceptance of final report and on submission of supp. documents





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TERRE DES FEMMES



Thank you for your attention!

TERRE DES FEMMES e.V.

Human rights for women

Brunnenstraße 128

13355 Berlin

Tel.: 030/40 50 46 99 - 26

change@frauenrechte.de

www.frauenrechte.de

