



Workshop

Managing your Tempus project

DAAD Tempus Day
Bonn, February 2009



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Agenda

- 1. Reports**
- 2. Description of progress**
- 3. Statement on the costs incurred**
- 4. Table of Achieved/Planned outcomes**
- 5. Summary report for publication**
- 6. Co-financing concept and determination of the final grant**
- 7. Budget headings & ceilings**
- 8. Modifications**
- 9. Questions and Answers**

Reports

➔ **1st Report - Report on start-up activities and amendments to the Original Proposal**

No longer exists for Tempus IV projects

➔ **2nd Report - Progress in relation to activities**

➔ **Final Report - Overall achievement level in relation to the total awarded grant and details on all expenses**

- ✓ **Report on the action's implementation (IR/LR)**
- ✓ **Table of Planned/Achieved Outcomes (IR/LR)**
- ✓ **Statistics and indicators (IR/LR)**
- ✓ **Summary report for publication (IR/LR)**
- ✓ **Financial report:**
 - **Statement on the costs incurred (IR/LR)**
 - **Summary statement of the receipts and expenditure of the action (LR)**
 - **All supporting documents (LR)**



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Description of the project's progress: some tips

- ✓ **Identify questions that are relevant to your project**
- ✓ **Build upon the information provided in previous reports**
- ✓ **Don't hesitate to report any shortcomings**
- ✓ **Don't hesitate to give us background information**
- ✓ **Be as detailed as possible, demonstrating progress with indicators**



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Description of the project's progress: detailed indicators

Some examples of “Tempus” indicators:

“Staff trained”

=> 5 of the 10 staff members of the Department have acquired new skills which have been evaluated and certified by the Project Board in January 2007

“New course developed”

=> 1 new 25 teaching hours course as part of the regular undergraduate curriculum by Spring 2007 taught to 3rd year students.



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Description of the project's progress: detailed indicators

Some examples of “Tempus” indicators:

“Centre established”

=> Centre formally established through Statute dated 1 September 2007 as a Unit of the Faculty, with 2 staff members, equipment, 3 classrooms and additional Faculty financial resources until 2010.

“Student mobility achieved”

=> 3 undergraduate students in their final year acquire in July 2007 20 ECTS following a 3-month study period in the EU during Spring 2007.



Table of Achieved/Planned Outcomes

Aim: to provide the intermediate achievements of the project in relation to the Original Proposal/previous report

The online report contains one table for each outcome identified in the project proposal:

1. **Activities carried out and indicators of achievement**
2. **Planned activities and indicators for progress**
3. **Any proposed changes**



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Statement on the costs incurred

1st Report : Not required

2nd Report : Not required

2nd pre-financing : Required

In Tempus IV, the 1st report and the 2nd prefinancing are linked again

Final Report : All expenditure incurred in the framework of the project (beginning to end)

The Tempus grant contribution may not exceed 95% of the total eligible costs (Tempus + co-financing) at the end of the action

Actual Co-financing (minimum 5%)

- **should be declared and justified in the Final Report and will be considered and assessed for the calculation of the final total eligible costs**
- **must satisfy the same criteria as Tempus rules (except for contractual ceilings of 30% and the 10% flexibility on transfers between budget headings)**
- **can be declared under any budget heading except Indirect costs (since those cannot easily be directly attributable to the action)**



Co-financing and final grant

- The EC grant can cover no more than 95% of the total eligible costs of the project. The remaining costs, equivalent to at least 5% of the total eligible costs, must be co-financed. = Ceiling A
- The EC grant cannot exceed the amount necessary to balance the action's receipts and expenditure and that it may not in any circumstances produce a profit for him. = Ceiling B
- The EC contribution cannot exceed the maximum Tempus grant amount (A.3 of the Grant Agreement). = Ceiling C

Determination of the final grant

Ceiling A: 95% of the total eligible costs at the end of the action

Ceiling B: Total declared expenditure minus declared co-financing amount

Ceiling C: Maximum Tempus Grant amount = A. 3

After calculating the three ceilings, the final grant will correspond to the lowest amount among them



Budget headings & Contractual ceilings

**I. Staff costs (incl. replacement costs):
plus up to 10% flexibility
without authorisation**

**Max. 30% of the Tempus Maximum Grant
Amount (A.3 of the Grant Agreement)*.**

**II. Travel costs and Costs of stay (incl.
students) plus up to 10% flexibility
without authorisation**

**Costs of stay: Maxima amounts per person
Travel costs: Actual costs per person**

**III. Equipment plus up to 10%
flexibility without authorisation**

**Max. 30% of the Tempus Maximum Grant
Amount (A.3 of the Grant Agreement)***

**IV. Printing & Publishing plus up
to 10% flexibility without
authorisation**

**Max. 7% of the Tempus Maximum Grant
Amount (A.3 of the Grant Agreement). Co-
financing is not permitted.**

**V. Other costs plus up to 10%
flexibility without authorisation**

**VI. Indirect costs plus up to 10%
flexibility without authorisation
Never more than 7% of A.3**

***Co-financing under these headings is not
subject to the above mentioned limits**



I. Staff costs

purpose

Staff costs should:

- Cover only administrative or academic tasks (3.1 Annex V)
- Cover eventual “Replacement costs” (3.2 of Annex V)

contractual rules

Tasks directly necessary and not covered by other sources

30% ceiling: Calculation based on the Tempus
Maximum Grant Amount = **30% maximum of A.3**
! Co-financing is not subject to the 30% limit

! Staff costs should respect local salary rates

supporting documents

The Contractor should provide:

- For consortium member staff : a Convention
- For non-consortium member staff : a Subcontract, a related invoice and a Convention
- For replacement of EU teaching staff: confirmation of engagement and a Convention
- Separate Conventions for ADMINISTRATIVE & ACADEMIC tasks



II. Travel costs/costs of stay (staff)

purpose

Travel Costs and Costs of Stay for:

Assignments for teachers/trainers administrative staff and experts listed in Annex I, retraining and updating courses, practical placements, development of academic activities, short visits for coordination and planning, short intensive courses, dissemination visits

contractual rules

The amount for Travel Costs & Costs of Stay should:

- cover only actual travel costs
- respect the maxima per person – see table 4.4.3, Annex V (for costs of stay)

Travel for research activities is not allowed

supporting documents

For staff in mobility the Grantholder provides:

- a complete Individual Grantholder Report (IGR) for each mobility using the standard form
- readable copies of travel tickets, invoices



II. Staff – activities and mobility directions

Activity

Direction

Assignments for teachers/trainers		EU → PC / PC → EU
Re-training and up-dating courses	➔	PC → EU, Candidate countries
Practical placements	➔	PC → EU, Candidate countries
Development of academic activities	➔	EU → PC / PC → EU / PC → PC / EU → EU
Short visits for coordination and planning	➔	EU → PC / PC → EU / PC → PC / EU → EU
Short intensive courses (including language)	➔	Within the PC or combined with another planned PC → EU mobility
Visit for dissemination purposes	➔	Mobility is allowed to other institutions in the Partner Countries (even if they are not in the consortium)



II. Travel costs/costs of stay (students)

purpose

Travel Costs & Costs of Stay apply to project consortia students for:

Study periods, practical placements in an enterprise, intensive courses for Partner Country students and participation of student representatives in University Management project

contractual rules

The amount for Travel Costs & Costs of Stay should :

- cover only actual travel costs
- respect the maxima per person (for costs of stay c.f. 4.5.3 of Annex V)

Host universities can claim **institutional costs** for receiving students from abroad (c.f. 4.5.4 of Annex V)

supporting documents

For students in mobility the Grantholder provides:

- a complete Individual Grantholder Report (IGR) for each mobility using the standard form
- readable copies of travel tickets, invoices



II. Students - activities / mobility directions

Activity		Direction		Minimum duration
Study period	➔	EU → EU NO!	➔	3 months
Practical placement	➔	EU → EU NO!	➔	1 month
Intensive course	➔	PC → EU ONLY!	➔	15 days
Student representatives in UM_JEP	➔	All	➔	-

Specific authorisation is requested for any destination different from the above ones.



III. Equipment

purpose

Equipment should:

- be eligible
- be exclusively for the eligible institutions marked with an **asterisk** in Annex I of the Grant Agreement where it should be used, inventoried and installed
- be exempt from VAT and custom duties (if a “Framework Agreement” between PC and EU stipulates this exemption)
- Depreciation is not applicable.

contractual rules

30% ceiling: the calculation is based on the Tempus Maximum Grant Amount = 30% maximum of A.3
! Co-financing is not subject to the 30% limit

supporting documents

The Grantholder provides readable copies of:

- all invoices for all equipment declared costs
- Proofs of awarding procedure (3 offers)



IV. Printing & Publishing

purpose

Printing & Publishing should cover :

- paper and electronic productions (eg. electronic form)
- design and development of website
- photocopying of teaching materials

(general photocopying = Indirect costs)



contractual rules

Internal staff costs may not be covered by this budget heading (i.e. web updating and web maintenance)

supporting documents

The Grantholder provides readable copies of:

- all invoices



V. Other costs

purpose

Other costs should cover other costs not included under other categories:

- dissemination of information (advertisement in a newspaper)
- inter-project coaching
- visa costs including the compulsory Schengen visa insurance
- mobility costs to get visa: under travel costs budget heading
- bank charges (including bank guarantee if requested)
- external translations and external language courses
- rent of premises for dissemination events (Commission authorisation is required).

contractual rules

Ineligible costs: hospitality costs, costs related to the use of materials incurred by institutions when hosting students/ staff, registration fees for courses, staff, printing and publishing, mobility costs, etc.

supporting documents

The Grantholder provides readable copies of:

- invoices and bank statements



Award of contract Procedure

the Award of contract procedure (Art. II.9) shall be applied when purchasing any kind of goods or services in the framework of the action:

BUT only

- **when the amount to be contracted out exceeds the threshold of €10.000 (offers can also be taken by Internet).**

No « saucissonage du marché » is allowed.

Proofs of awarding procedure should be kept and submitted with the Final report

AND not

- ✓ **when the amount to be contracted is less than €10.000, in which case a direct agreement can be made with a supplier.**
- ✓ **When sub-contracting external experts/individuals/industry/enterprises/institutions for administrative and academic tasks**



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VI. Indirect Costs

purpose

Indirect Costs can cover:

- stationary, office supplies, general photocopying
- postage and telecommunication costs attributable to the project

contractual rules

Flat-rate corresponding to maximum 7% of the Tempus
Maximum Grant Amount = **7% maximum of A.3**

supporting documents

NO supporting document is required

NO co-financing is permitted under this budget heading



Modifications: general advice

- ✓ **Modifications in terms of budget and activities acquire contractual value after prior written approval of the Commission**
- ✓ **Requests for modifications should be duly justified in relation to the project objectives**
- ✓ **Modifications should be detailed**
- ✓ **Modifications can be introduced either through the 1st and 2nd Report or through general correspondence**



Modifications

Prior written request to the EC for authorisation is needed for:

- ✓ **Addition of a consortium member**
- ✓ **Withdrawal of a consortium member**
- ✓ **Changes of contact person at the Grantholder Institution**
- ✓ **Extension of the agreement period**
- ✓ **Suspension**
- ✓ **Any modification resulting in a major change of activities or leading to an increase of more than 10% of a budget heading**
- ✓ **Requests must indicate the reason and the impact of such budget modifications on the activities and the expected outcomes of the modification**



General advice for your reporting

- ✓ **Schedule the co-ordination meetings in due time**
- ✓ **Ensure that all partners are well aware of Tempus rules and procedures**
- ✓ **Collect the supporting documents from all partners as soon as activities have taken place**
- ✓ **Update and use the Logical Framework matrix, workplan and reports as monitoring tools**
- ✓ **Check the quality of your reports**
- ✓ **Do not under-estimate the time and the human resources needed for the reporting activities**

Who may help?

- ✓ **Frequently Asked Questions on the web:**

http://ec.europa.eu/education/programmes/tempus/manage_en.html#2

- ✓ **The studies and publications on the Tempus website**

- ✓ **The contact person at the EC Commission**

- ✓ **The NTO or the NCP**

- ✓ **The International Relations office of the University**

- ✓ **As of 1 April 2009, the programme will be managed directly by the Education, Audiovisual and Culture Executive Agency**

<http://eacea.ec.europa.eu/index.htm>