



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



Towards Inclusive Education For Refugee Children (TIEREF)

Call: EACEA/07/2017

Key Action 3: Support for policy reform - Social inclusion through education, training and youth

592142-EPP-1-2017-1-TR-EPPKA3-IPI-SOC-IN

WP1: Management

“Project management handbook”

Version 2

March, 2019



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



Authors:

Istanbul Milli Egitim Mudurlugu, Turkey (Project Coordinator)

Mrs. Figen Sekin

Mr. Ömer Faruk Metin

Contributors:

Zgura-M Ltd., Bulgaria (Internal evaluation manager)

Maria Goranova

Andrean Lazarov



Table of contents

1. WHO IS THIS HANDBOOK FOR?	4
2. GENERAL DEFINITIONS	5
3. ORGANISATION AND PARTNER ROLES	7
4. PROJECT CHANGES	8
5. GRANT FINANCIAL MANAGEMENT	9
5.1 Unit Costs and Real Costs	10
5.2 Unit Costs: The use of lump sums, the reimbursement on the basis of unit costs and the flat-rate financing	11
5.3. Real Costs	12
5.4. Budget Category Transfers	13
5.5. Staff costs	14
5.6. Transnational Project Meetings	15
5.7. Project deliverables	16
5.8. Multiplier Event.....	17
5.9. Subcontracting Costs	18
6. RETAIN SUPPORTING DOCUMENTATION	19
7. CONVERTING CURRENCY	20
8. PROJECT START AND END DATES	21
9. USING THE ERASMUS+ LOGO	22
10. REPORTING AND MONITORING	23
11. IMPORTANT TEMPLATES	24
Annex I Timesheet template.....	24
Annex II List of participants template.....	25
Annex III Dissemination reporting template.....	26
Annex IV Declaration of attendance	28
DECLARATION OF ATTENDANCE	28



1. Who is this handbook for?

This project handbook is designed to project partners under the TIEREF project partnership to run their activities and responsibilities in line with the Erasmus+ Key Action 3: Support for policy reform - Social inclusion through education, training and youth projects.

This handbook is a guidance document only and is designed to provide information to support the TIEREF Grant Agreement (including all associated annexes) and the 2018 Programme Guide.



The project Grant Agreement and the Programme Guide are the primary documents you should refer to and need to comply with.

Should any information in this handbook differ from either the Grant Agreement or the Programme Guide, the content of the Grant Agreement, its annexes and the Programme Guide will take precedence.



2. General Definitions

Erasmus+ Programme (E+):	A programme funded by the European Commission from 2014 to 2020, which offers a range of funding opportunities for organisations actively involved in delivering education, training, youth and sport activities.
Accompanying	A person who accompanies participants on placement. Such individuals are eligible for financial support under the programme. It should be noted that accompanying persons are not regarded as participants.
Beneficiary	Any organisation declaring its intention to submit a proposal for transnational cooperation in accordance with the established programme procedures. The applicant organisation becomes the grant beneficiary when the proposal is approved and then assumes overall responsibility for carrying out the project.
Exceptional Costs	A contribution to the real costs incurred in relation to the sub-contracting of goods or services that cannot be provided by the beneficiary organisations themselves.
Intellectual Outputs	Substantial, high quality tangible outputs of a project such as open educational resources, curricula, IT tools or other pedagogical materials.
Key Action 3 (KA3):	A strand of the Erasmus+ Programme which supports policy reform - Social inclusion through education, training and youth projects can address one or more fields of education, training and youth, and aim to develop, transfer and/or implement innovative practices and promote the exchange of good/best practices. KA3 projects can involve a range of different activities, including transnational teaching, training and/or learning activities where these contribute to achieving the objectives of the project.
Legal Representative:	An individual person authorised within the beneficiary organisation to sign legally binding documents



Mobility:	This refers only to the period of time a participant spends in another European country.
Multiplier Events	National or transnational conferences, seminars or events aimed at sharing and disseminating Intellectual Outputs produced by the project. Only projects delivering Intellectual Outputs can include Multiplier Events.
Participant:	Anyone who is sent to a host country other than their country of origin or that where they are employed, undergoing training or reside.
Project:	This refers to the project in its entirety; including activities such as preparation, organisation and management, monitoring, evaluation, validation and dissemination.
Receiving Organisation:	The organisation responsible for receiving participants from abroad and offering them a study/ traineeship programme, a programme of training activities or benefitting from a teaching opportunity.



3. Organisation and partner roles

To ensure that all parties involved are committed to delivery of a high quality project, all roles and responsibilities need to be clearly agreed and outlined in contracts or partnership agreements. Some areas for partners to consider implementing a high quality project include:

- Ensuring a strong and committed partnership is in place prior to project implementation.
- Ensuring that the training content is relevant to the needs of participants as well as meeting the objectives of key action 3.
- Ensuring that there are clear and appropriate monitoring arrangements in place.
- Ensuring that you have clear management strategies in place, with appropriate personnel responsible for managing the project.
- Having clear financial reporting mechanisms and an appropriate accounting system in place to ensure all evidence of expenditure is recorded (prior to inputting information onto the mobility tool+).
- Having quality control measures in place to allow you to evaluate the impact and the progress of the project on an ongoing basis and ensure appropriate action is taken if required within the project budget and project time-frame.
- Having a (smart) dissemination plan in place to ensure that all parties disseminate project results to the relevant target groups, using appropriate channels at different stages of the project.
- Ensuring that participants are supported with relevant preparation prior to placement and practical support available throughout the period of the project.



4. Project Changes

The TIEREF Key Action 3 project has been approved by the Education, Audiovisual and Culture Executive Agency (EACEA) based on information provided in the original grant application. If you need to make any changes to your project, the Coordinator should notify EACEA immediately and before any changes are implemented.

All partners should note that the EACEA is not obliged to approve changes to the project. As such, partners should not action any changes until you have received written confirmation from the EACEA (verbal agreements are not binding from either party). Should you proceed with these changes before receiving authorisation to do so, the EACEA has the right to request repayment of the corresponding part of your grant.

Any request for amendment must be received by the EACEA in good time. The EACEA usually require notification at least one month before the intended implementation of the changes in order to allow sufficient time for approval. The EACEA is unable to process an amendment request during the last month of your project activity; this is in accordance with European Commission guidance. Therefore, partners should therefore ensure that your project is on track and that no changes need to be made in the final stages of the project.

A change to any project's contact person, legal representative or to any organisation's bank details is not regarded as an amendment to the original grant application. Therefore, should if the project needs to make any of these changes, please notify the EACEA Project Officer by email. Then, the EACEA will provide further guidance. Any communication with the EACEA could be initiated only by the Project Coordinator.



5. Grant financial management

An Erasmus+ grant is an incentive to carry out a project which would not be feasible without European Union (EU) financial support, and is based on the principle of co-financing. Co-financing implies that the EU grant may not finance the entire costs of the project; the project must be funded by sources of co-financing other than the EU grant. The EACEA cannot grant additional funds to projects after the allocation of funds to the project and issuing of your organisation's Grant Agreement.



5.1 Unit Costs and Real Costs

While the project has been awarded a ‘maximum grant amount’, this does not necessarily mean that the project will be entitled to or receive this full sum. Erasmus+ grants are made up of a combination of unit costs and real costs. The project will only be eligible for unit costs and real costs for activities that are realised. The project Grant Agreement Annex III details each budget category as an underlined heading. For each budget category the grant agreement provides information on the following:

A. **The Calculation of the Grant Amount**

This information details how costs for that budget category are calculated.

B. **The Triggering Event**

This information details what needs to happen in order for the project to be eligible for each cost. E.g. Transnational Project Meetings: To claim the unit cost for a participant, the participant must actually travel and complete the mobility and attend the meeting as approved by the EACEA. If the triggering event is not realised, the project would not be eligible for the Transnational Project Meeting unit costs for this participant. The Transnational Project Meeting cost for the participant who did not travel will be removed from the overall project grant budget (unless transferred using the budget category transfer rule); either by deduction from the final grant payment.

C. **Supporting Documentation**

This information details what a project needs to keep as evidence that the triggering event actually happened. E.g. Transnational Project Meetings: Projects are required to keep and retain a certificate of attendance per participant as a minimum.

D. **Reporting**

This details the information you will be required to input into Technical reporting form

It is important to remember that a project will not be eligible for a unit cost if a triggering event does not occur, or a project does not retain the supporting documentation as detailed in its Grant Agreement.



5.2 Unit Costs: The use of lump sums, the reimbursement on the basis of unit costs and the flat-rate financing

Erasmus+ projects are entitled to the unit cost flat rates, provided that a triggering event happens and supporting documentation is retained as evidence. Projects are still entitled to full unit costs (flat rate) even if the 'real' actual expenditure is less. The participant travels and attends the transnational project meeting as planned (see the Excel Budget table attached to the approved Grant agreement). The project retains the required supporting documentation e.g. boarding passes, tickets, invoices, certificate of attendance as evidence that the triggering event happened.



5.3. Real Costs

The budget categories Staff costs, Travel & subsistence costs, Equipment costs, Subcontracting costs, Other costs are based on the principle of real costs. 80% of eligible costs under those headings will be reimbursed, provided that this does not exceed the budget category amount awarded by the EACEA. Please note that timesheets, payslips, payrolls, contracts, receipts, boarding passes, tickets and invoices are required as evidence for real cost expenditure.

5.4. Budget Category Transfers

Within your Key Action 3 project, there is some flexibility to transfer certain elements of TIREF grant between the different budget categories without submitting a formal contract amendment request to the EACEA for approval.



Each partner should read the information in this section and the information in your Grant Agreement in its entirety, and contact us as soon as possible if they have any questions regarding the principle of budget category transfers. It is highly recommended to update the Budget Excel Table as the project progresses. This will assist the consortium with managing your budget, keeping track of unit costs you are eligible to claim for and also managing budget category transfers.

To understand how budget category transfers work each partner must understand how grants are funded. It is important to understand that triggering events are needed for a project to be eligible for the associated costs. It is also important to understand that surplus does not need to be budget category transferred.

Please note:

- Partners cannot transfer money to a budget category where no funds were originally granted;
- Partners cannot decrease a budget category by more than 20%;
- Partners cannot increase a budget category by more than 20%;
- Partners cannot transfer money to the Equipment and Subcontracting Costs budget categories;



5.5. Staff costs

Costs eligible under this budget category include staff costs in line with the described work packages. Each partner should check thoroughly their responsibilities as indicated in the Description Word File attached to the project application form. Each partner should follow the number of the days aligned to particular WP as well as with the type of staff involved (Managers, Researchers/Trainers/Teachers, Technicians, Administrative staff).



5.6. Transnational Project Meetings

These meetings are for project coordination and planning purposes. As per Annex III of the agreement, the venue for Transnational Project Meetings should be held and hosted in the country of a project partner. For meeting costs to be eligible under the Transnational Project Meetings budget heading, activities must involve participants from partner organisations from at least two different Programme Countries. When the travel distance for Transnational Project Meetings is less than 100km, it is not possible to claim unit costs.

In the context of TIREF project the following meetings will be implemented:

- Kick off meeting - Istanbul, TR M1 (P1)
- Second TSN meeting - Plovdiv, BG, M6 (P3)
- Third TSN meeting - Craiova, RO, M13 (P8)
- Fourth TSN meeting - Trikala, GR, M19 (P7)
- Fifth TSN meeting - Bari, IT, M25 (P6)
- Sixth TSN meeting - Dangavpils, LV, M31 (P5)
- Final TSN meeting - Istanbul, TR, M36 (P2)

Due to the replacement of the partner P6 Istituto Comprensivo "Japigia1- Verga", Italy with University of Catania, Italy the venue of the Fifth TSN meeting will change to be instead of Bari to Catania, Italy.

Due to the withdrawal of P5 Baltic Countries International Education Foundation Academy, Latvia the partnership has decided to shift that meeting to be held in Plovdiv, Bulgaria.

Furthermore, the consortium has decided to shift that meeting to become a third partners meeting, therefore the actual schedule of the TSN meetings will be as following:

- Kick off meeting - Istanbul, TR M1 (P1)
- Second TSN meeting - Plovdiv, BG, M6 (P3)
- Third TSN meeting – Plovdiv, BG, M13 (P3)
- Fourth TSN meeting - Craiova, RO, M19 (P8)
- Fifth TSN meeting - Trikala, GR, , M25 (P7)
- Sixth TSN meeting - Catania, IT, M31 (P6)
- Final TSN meeting - Istanbul, TR, M36 (P1)



5.7. Project deliverables

To be classed as a member of staff, individuals have to be employed by the organisation either on a professional or a voluntary basis.

In order for costs to be eligible, partners need to be able to demonstrate a formal link (on a professional basis) with the persons which staff costs are being claiming for. To demonstrate this formal link, you need to keep proof of the nature of the relationship (e.g. employment contracts or agreements).

At the reporting stage, the coordinator will need to input details of all deliverables produced in the Technical report and upload them onto the Erasmus+ Project Results Platform. Each partner will also need to report the number of days of work specifically for each deliverable per staff category for each partner on the basis of the timesheets kept.

Timesheets for each person will also need to be kept according to the supporting documentation section of your Grant Agreement. Annex III of the Grant Agreement provides details regarding the unit costs available per country. Please note that people working for the organisation on the basis of a service contract (e.g. translators, web designers, etc.) are not considered as staff of the organisation.

Therefore, their staff time cannot be claimed under Staff costs. Staff costs incurred by individuals external to the partner organisations belong under the Subcontracting Costs budget category and should only be claimed if included and approved in the projects budget.

When preparing timesheets each partner should consider the following:

- To be produced every month
- To be signed by both employee and senior manager
- Not to be backdated!
- Explain clearly the task that you have done in connection with the task list written under each deliverable.
- Do not copy/paste from one timesheet to another
- Write them in English!
- Attribute the task always to particular deliverable.
- Check the number of the days that you have for each deliverable (do not exceed them!)
- Check the rates for each staff member – they need to be dully justified (payslips, payroll, annual salary sheet, document for the payments via bank transfers etc.)



5.8. Multiplier Event

Multiplier events are national and transnational conferences, seminars, events organised by the project to share and disseminate intellectual outputs realised by the project to organisations and individuals outside of the Erasmus+ project partnership. Support for multiplier events is provided only if in direct relation to the deliverables of the project. In the context of TIREF project there will be a multiplier event organised in Month 24 in Istanbul, Turkey. The budget for this event is under the costs of P1.



5.9. Subcontracting Costs

Any grant awarded under Annex III can be used for subcontracting requirements and costs related to the approved application. For Exceptional Costs, you need to report the actual costs incurred in the Mobility Tool+. The BG National Agency will reimburse 75% of the eligible costs actually incurred or €50,000 - whichever is the lowest.

That contribution to real costs includes costs related to subcontracting or purchase of goods and services as approved in the Grant agreement – external evaluation, production of promotional dissemination materials by external publishing house - leaflets, roll-up posters etc., hiring of room and catering for beneficiaries during dissemination and exploitation events, organisation of the final multiplier event for exploitation purposes - hiring of room, buffet, conference pack, banners Supporting documents that should be provided are selection of offer, invoice, subcontracting agreements, bank transfers, etc.

6. Retain Supporting Documentation



All partners should ensure that the costs incurred as part of your Erasmus+ KA3 project are considered eligible in accordance with the project Grant Agreement. They must also ensure that expenditure is substantiated by adequate supporting documents that can be produced in the context of the checks or audits as described in your Grant Agreement.

Specific information about the supporting documentation that each organisation is required to retain for each budget category of the grant can be found in the project Grant Agreement.

All organisations should also keep evidence of all project expenditure (at least 5 years after project end). Keeping project expenditure by way of receipts and invoices is not only good practice but may be required in evidence should your project be subject to the organisation's internal audits or external audits associated specifically with your Erasmus+ project.

It is advisable to keep as much original information and evidence as possible in a project file. This will facilitate a smooth handover if the project coordinator change during the project lifetime, and also help the coordinating organisation complete the narratives of its Erasmus+ final report when the time comes.



7. Converting Currency

It is only necessary to convert costs for reporting that are incurred under budget categories based on real costs, namely special needs support and exceptional costs. All reporting takes place in Euros. For budget categories based on unit costs, no conversion is necessary as actual expenditure for these budget. For budget categories based on real (actual) costs (special needs support and exceptional costs), you may need to convert invoice values for the purpose of reporting if they are not incurred in Euros.

You must use the monthly exchange rate, published by the Official Journal of the European Union, for the day in which your organisation's bank account was credited with the project's pre-financing payment. You can access the Official Journal of the European Union [here](#). Please do not use the rate on the date of the invoice. Please contact us as soon as possible if you would like assistance converting invoices for special needs support or exceptional costs into Euros.

All payments from the EACEA to beneficiaries are made in Euros. The EACEA is not responsible for any delay caused as a result of an institution's bank account's inability to receive payments in Euros.



8. Project Start and End Dates



All project activities must take place between the project start and end date (15 January 2018 – 14 January 2021). The project start and end date can be found in the Grant Agreement. Any activity (e.g. mobilities or trips) that fall outside the project start and end date will be deemed ineligible for funding. This could lead to reductions of your final grant amount.



9. Using the Erasmus+ Logo

Each partner must use the European Commission's Erasmus+ logo and associated wording for any project outputs and promotional materials and publicly acknowledge the support received from the European Union. The preferred option to communicate about EU funding is to record 'Co-funded by the European Union' next to the EU emblem on the communication material where the EU emblem is used. All available logos can be downloaded via : https://eacea.ec.europa.eu/about-eacea/visual-identity_en



10. Reporting and monitoring

Beneficiaries are accountable to the EACEA for the implementation of the project, for the use of funds received and for the amounts paid to participants. All beneficiaries are required to submit a progress and final reports and must gather and retain all necessary information and supporting documentary evidence for expenditure.

In the context of this project the coordinator will make:

- Monthly reviews according to the action plan
- 6-monthly reports on the realised activities with recommendations for the improvement of the partners' performance.

The internal evaluator Zgura-M Ltd. will make:

- Evaluation of each partner meeting
- 6-monthly observation of the accomplished tasks and quality of the produced intellectual outputs
- Short report for the interim and final report.

The EACEA is required under its contract with the European Commission to undertake monitoring activities, audits and checks on a representative sample of organisations each year. The checks vary in scope and depth according to the kind of check performed. These checks are carried out to ensure that the management of the Erasmus+ Programme is satisfactory and within the terms of the grant agreement and programme rules. Beneficiaries are accountable to the EACEA for the implementation of the project, for the use of funds received and for the amounts paid to participants. Therefore, beneficiaries should ensure that appropriate reporting and monitoring procedures are in place. Beneficiaries must gather and retain all necessary information and documentary evidence, which demonstrates clear and transparent management of the project as this may be inspected by the European Commission.



11. Important templates

During the project lifetime the partners should use the below templates for timesheets, attendance list and reporting on dissemination. They will be checked every 6 months and based on that the next financial instalment will be released.

Annex I Timesheet template

Project	:	Towards Inclusive Education For Refugee Children (TIREF)
Project number	:	592142-EPP-1-2017-1-TR-EPPKA3-IPI-SOC-IN
Institution	:	
Country	:	
Period	:	
Currency	:	

Date	Category of Staff	Name of Staff	Description of Work Activity	IO	Number of Work Days	Grant Per Day	Payment (EURO)
Total Payment				:		0	0

Employee:

Manager:

Date :

Date :



Annex II List of participants template

Title of the event: TIREF project (592142-EPP-1-2017-1-TR-EPPKA3-IPI-SOC-I) Date: Place:		By stating the information in these fields, I declare that I give the explicit consent to (name of the partner): to store my personal data for the purposes of the project related to the events it organizes, and the latter undertakes not to provide this information to third parties persons. *		Check this box if you agree to be informed about other events by email and/or phone	
Name and Surname	Organisation & position	E-mail	Phone number		Signature
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	



Annex III Dissemination reporting template

Reporting Template for Dissemination Activities

Organisation:	
Country:	
Reporting period:	

Activities/ method/ tools ¹	Brief description of the dissemination activity and its aims	Date/ s Durati on Frequ ency	Plac e/s	Dissemin ation of the project results		Location ²					Chara cteris tics of target group /s ³	Size / numb er of organ isations / perso ns reach ed / perso ns involv ed (appr oxima tely)	Results /impac t	Eviden ce avail able	
				Ins ide par tne rsh ip	Out side part ner ship	L	R	N	E	I					
	<i>EXAMPLE:</i>														
Present ation and Networ king	<i>Presentation of the project and networking with stakeholders during the VII Fair of social inclusion, Sofia</i>	<i>16.0 4.2018</i>	<i>Sofia, BG</i>		<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>trainers principals students Parent</i>	<i>Appro x. 200</i>	<i>Present ation of the project Network ing</i>	<i>Photos</i>	

¹Academic conferences and publications, academic contacts. articles, contact with schools, training organisations, universities/colleges, contact with educational inspectorates, education authorities, Ministry of education, discussions (public, scientific), informational meetings, interviews, online news and publications, press conferences, promotional activities, training workshops, workshops; other.

² L =local, R = regional, N = national, E – European Union level, I = international.

³ Vocational teachers, school principals, trainers working with unemployed young people or young people with disabilities, Students from VET schools, individual young people involved in VET or post VET routes eager to gain work experience both nationally or internationally, other.

This project has been funded with support from the European Commission (Erasmus+ Programme). This publication 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.



Annex IV Declaration of attendance

DECLARATION OF ATTENDANCE

Towards Inclusive Education For Refugee Children (TIREF)
Project number: 592142-EPP-1-2017-1-TR-EPPKA3-IPI-SOC-IN
UNDER THE ERASMUS + PROGRAMME

This is to confirm that

/ name of participants/

From

/name of sending organisation/

Have attended a

Organized by

Between

(WORKING DAYS)

SIGNATURE

/forename, surname, function of the legal representative of the receiving organisation/

Done at

/place, date/



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

