



Project Management,
Reporting and
National Erasmus+ Office
monitoring



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Contents

- ✓ Elements of good management models in Capacity Building in HE projects
- ✓ Relevant documents to be aware of...
- ✓ Reports and monitoring
- ✓ Additional details to be taken care of concerning financial aspects
- ✓ Some challenges

Elements of good project management :

- ❖ Awareness of Erasmus+ rules
- ❖ Good planning
- ❖ Clear division/delegation of tasks and responsibilities
- ❖ Project teams at each of partner institutions (consisting of managing, teaching, administrative and technical staff)

- ❖ Transparent decision-making procedures
- ❖ Communication & continuous self-evaluation
- ❖ A problem-solving approach

- ❖ Support of institutional authorities
- ❖ Appropriate dissemination of project results

Different project management approaches

- Daily coordination with clear delegation of tasks to partners, precise partnership agreements, cash flow tables, procedures for (almost) everything...
- Decide as you go – without precise partnership agreements, re-discussing even minor issues, not disbursing the funds to partners...
- Transparent and confidence-based approach – use of eTools like Kanban, everyone participate in decision making, but there are no formal agreements...

Good practice

- Detailed partnership agreements
- Efficient and easy to use communication tools – like Doodle, mailing lists, Google docs, Trello...
- Cash flow tables
- Internal management platform
- Clear instructions on how to fill the requested documents – a manual with samples
- Regular internal reporting and checking of documents
- Internal monitoring – *use of the LFM and WP, paying attention to delivery dates*

Relevant documentation that all partners should be aware of:

1. Full text of the project proposal (including budgetary allocations)
2. Text of the Grant Agreement and all its annexes
3. Guidelines for the Use of the Grant for CBHE projects
 1. Frequently asked questions for projects
 2. Management is based on Grant agreement and other previously presented relevant documents, as well as on **partnership agreements** applicant institution is signing with all partners in the project

The account or sub-account must identify the project payments – it is highly recommended for all the partners to have separate project accounts to identify transactions more easily.

Reports and monitoring by the EACEA and NEOs

- Reports to be submitted to EACEA
 1. Intermediate Report
 2. Final Report
- Monitoring done by the National Erasmus Offices:
 - ❖ Preventive* (in the first project year)
 - ❖ Advisory* (after the first half of project implementation)
 - ❖ Control (after the end of the project - **sustainability check**)

*NTO monitoring is based on deliverable achievement

Some (hopefully) useful remarks

- ❖ Be aware of **ineligible costs** (e.g. VAT, hospitality costs, registration fees for courses, seminars, symposia, conferences, congresses, etc.)
- ❖ **Transfer** between budget headings is possible but not more than **10%**
- For all questions that not clearly covered by above documents contact:
 - 1. EACEA desk officer
 - 2. NEO – project officer responsible
- ❖ **Communication with EACEA goes through project coordinator**
- ❖ Changes during the course of the project implementation have to be reported to and/or need to be approved in advance by EACEA:
 - addition or withdrawal of co-beneficiary, changes of contact persons, changes in project workplan, changes in budget headings over 10%, etc...

The project team “is not alone” - University/services
(in Serbia) are checking:

- Validity of payments before payment is done
- Collecting bank statements and all copies of supporting documents
- Documents before monitoring visits or sending it to EACEA
- Use specimen of previous, successfully closed projects as a model

Challenges

- Purchase of the equipment – (not) splitting the purchase, problems with import and recording in inventory books
- Some participants may have problems with their university/faculty authorities and might ask to receive funding on their personal accounts
- Some countries have complex governance in education
- Different and complex national legislations
- Different institutional procedures
- Importance of maintaining the institutional cooperation
- Caution concerning last 10% of the grant – payment can be claimed only if the money is paid from the institutional account within one month after the end of eligibility period

Thank you!

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