



Kick-off meeting Nov. 2015 – ERASMUS+-project
*Improving teacher education for applied learning
(ITE-VET)*

ITE-VET:
**Administrative &
Financial Issues**

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Discussion

First workshops in Valencia (01-04/03/2017) and Lviv (21-24/05/2017):

Suggestions for topics?



Discussion

First seminar in Kiev in May/June 2017 (29/05 – 02/06/2017):

Suggestions for topics?



Discussion

Distribution of tasks?

- Structured report
- Registration of the project in Ukraine
- Website
- ...



Financial issues

Financial issues – Kinds of costs

Staff costs

Unit Costs

4 staff categories: manager, researcher/teacher/trainer, technician, administrator

Travel costs

Unit Costs

Students/staff from partners in countries involved in the project from their place of origin to the venue of the activity and return

Costs of stay

Unit Costs

Subsistence, accommodation, local and public transport, personal or optional health insurance

Sub-contracting costs

Real Costs

Exceptional for services related to competences that can't be found in the consortium

Equipment costs

Real Costs

Purchased exclusively for the benefit of HEIs in the partner countries

Any other costs won't be covered by the grant!

Staff costs



- **Two variables:**
 - Type of staff category
 - Country in which the staff member is employed
- **Will be paid out in 4 tranches:**
 - 30% - April – May 2017
 - 20% - September – October 2017
 - 20% - July – August 2018
 - 30% - October – November 2018

Staff costs



- **Preconditions for the payments:**

- Achievement of outcomes as agreed upon
- Submission of necessary documents:
 - Staff conventions (forms to be provided by coordinator)
 - Time sheets (forms to be provided by coordinator)
 - Copies of employment contracts
 - Any material evidence allowing to verify that the declared workloads correspond to actual activities/outputs (e.g. attendance lists for lectures given, protocols, agendas, tangible outputs, etc.).

Categories of staff



MANAGER: (including legislators, senior officials and managers) carries out top managerial activities related to the administration and coordination of project activities

RESEARCHER, TEACHER AND TRAINER (RTT):

typically carry out academic activities related to curriculum/training programme development, development and adaptation of teaching/training materials, preparation and teaching of courses or trainings

TECHNICAL STAFF: (including technicians and associate professionals)

carries out technical tasks such as book-keeping, accountancy and translation activities; External translation services and external language courses provided by sub-contracted non-consortium members should be classified as “sub-contracting costs”

ADMINISTRATIVE STAFF: (including office and customer service clerks)

carries out administrative tasks such as secretarial duties

- ⇒ The staff category to be applied depends on the tasks carried out in the project and not on the position or function of the individual
- ⇒ The amounts of the wage rates for each category are dependent on the country of the respective institution where the staff member is employed

(PGL p. 289, UOG p. 28f .)

Example staff convention (extract)

THE FOLLOWING HAS BEEN AGREED:

1. The Institution is a member of the partnership for the above-mentioned project.
2. The Staff member is employed by the Institution and is part of its payroll system.
3. The Institution and Staff member agree that the Staff member has worked on this project and performed the following duties during the project's eligibility period.

	<i>dd/mm/yy</i>		<i>dd/mm/yy</i>
FROM		TO	

Please describe the outputs produced (short overall indication since detailed information has to be given in the accompanying time-sheet):

.....

.....

.....

4. Please complete the following information.

+	Staff category (Manager / Researcher, Teacher, Trainee, Technician / Administrative staff)	
	Country of the Institution in which the Staff member is employed	
	Number of days worked and charged to the grant (according to time-sheet)	

- Must be signed by the person who has performed the activity, countersigned and stamped by the person responsible (e. g. rector, dean) in the institution that employed this person
- For staff performing different categories of tasks a separate convention must be signed for each type of activity

Example of a time sheet

Add Row		Delete Row		PROJECT TIMESHEET	
Project number :					
Surname :					
First Name :					
Institution :					
Country :					
Position :					
Staff Category ¹ :					
Year	Month	Number of Days	Work Package	Description of tasks performed and outputs produced	

Travel costs and costs of stay

Lump sums for travel costs:

Travel distances between 100 and 499 km: 180 € per participant (*Ukraine – Ukraine*)

Travel distances between 500 and 1999 km: 275 € per participant (*Konstanz/Vienna – Ukraine*)

Travel distances between 2000 and 2999 km: 360 € per participant (*Ukraine – Valencia*)

Lump sums for costs of stay (daily allowances):

Independent of hosting country: 120 €/day for staff and 55 €/day for students
(*duration of stay 1 to 14 days*)

- ⇒ Treatment according to our travel cost agreement
- ⇒ No payment of daily allowances of travels to EU countries
- ⇒ Reduced payment of daily allowances of travels to and in Ukraine (depending on necessary amount of compensation for EU travels)

Travel cost agreement

Agreement on funding and managing the costs of travel and stay

According to the funding rules issued by the European Commission for the Call 2016, travel costs are funded as unit costs per travel distance band (beeline between place of work and travel destination). Therefore the European Union only funds a previously fixed amount of travel costs regardless of the real price of the trip and the mode of transport. In order to be able to guarantee a certain amount of mobility within the project, the project partners agree to the following procedure concerning the internal calculation and the refunding of costs of travel and stay:

1. All financial contributions concerning travel and stay by the European Union are collected in the project account administered by the project coordinator.
2. All mobility carried out within the project has to be approved by the project coordinator in advance of booking.
3. All mobility approved by the project coordinator is going to be financed with the funds administered by the project coordinator.
4. In cases where the travel and stay has not been booked and paid from the project account by the project coordinator, but pre-financed by project members the costs are reimbursed by the project coordinator subject to the actual expenditure on presentation of the receipts.

Travel costs and costs of stay

- Payment of pre-financed costs in link with travels (e.g. tickets for the transfer to the airport): cash during our meetings (Ukrainian partners), bank transfer after the meetings (EU partners)
- Travellers (workshops):
 - Staff members stated in the proposal
 - Very good command of English
 - Exceptions: prior permission by the coordinator needed
- Required documents:
 - Proofs that the journeys actually took place (e.g. travel tickets, boarding passes, proof of attendance in meetings)
 - Proofs that the journeys are connected to specific and clearly identifiable project-related activities (e.g. agendas of the meetings, protocols of meetings)
 - Individual Travel Report (see example)

Travel costs and costs of stay

ANNEX III - INDIVIDUAL TRAVEL REPORT for travel costs and costs of stay

To be filled in by *each* participant

In case of circular/multiple travels, please fill in separate Individual Travel Reports.

Ref. No. Project No.

The reference number must correspond to the progressive numbering indicated in the financial statements in the final report

(1) PERSONAL DATA

Surname: Forename:

Nationality:

Home institution:

Staff position/student year of study at home institution:

(2) TYPE OF ACTIVITY (Tick as appropriate)

STAFF

- | | |
|--------------------------|--|
| <input type="checkbox"/> | Teaching/training assignment |
| <input type="checkbox"/> | Training and retraining purposes |
| <input type="checkbox"/> | Updating programmes and courses |
| <input type="checkbox"/> | Practical placements in companies, industries and institutions |
| <input type="checkbox"/> | Project management related meetings |
| <input type="checkbox"/> | Workshops and visits for result dissemination purposes |

STUDENTS

- | | |
|--------------------------|--|
| <input type="checkbox"/> | Study period |
| <input type="checkbox"/> | Participation in intensive courses |
| <input type="checkbox"/> | Practical placements, internships in companies, industries or institutions |
| <input type="checkbox"/> | Participation in short term activities linked to the management of the project |

Travel costs and costs of stay

(3) DETAILS OF THE TRAVEL

PERIOD*	From (Depart date) (dd/mm/yy)	To (Return date) (dd/mm/yy)
PLACE OF DEPARTURE**	HOME INSTITUTION	
	COUNTRY..... CITY.....	
PLACE OF DESTINATION/ LOCATION OF ACTIVITY	HOST INSTITUTION	
	COUNTRY..... CITY.....	
TRAVEL DISTANCE***	Km	

*Please indicate period of travel from departure to return to place of origin
 ** If different from Home institution please enclose authorisation from the Agency
 *** Travel distance in Km (One-way travel) using distance calculator: http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm
 from place of departure to location of activities

(4) DETAILS OF THE ACTIVITY

DATES (excluding travel)	From (date):..... To (date):
<u>DESCRIPTION OF ACTIVITY(IES) PERFORMED</u> (brief description of the activities performed)	
.....	
.....	
.....	
.....	
.....	

SIGNATURE OF THE PARTICIPANT

I hereby declare that I have been carrying out the above-mentioned activities.

Date:.....

Signature:

Equipment costs



Equipment foreseen according to the budget:

- Equipment for teaching purposes in Ukraine:
 - Projectors
 - Screens for projecting presentations
 - Printers
 - Whiteboards
 - Visualizers
 - Flipcharts
 - Facilitator's toolboxes
- Actual costs are reimbursed (required documents: invoices, bank statements, proof that equipment is recorded in the inventory of the institution), but not fees for bank transfers

Subcontracting costs

Subcontracting foreseen according to the budget (extract):

- Travel costs and costs of stay for external experts from Germany, Austria and Spain
- Interpreters for seminars for university teaching staff in Ukraine
- Translation of financial evidences and of dissemination material

Only applicable, for tasks that are not achievable by the consortium!

Seminars and special mobility

Organisation of workshops and seminars

- Done by the hosting institution in cooperation with the coordinator
- All flight tickets are booked by the coordinator
- Hotel invoices are paid by the coordinator on site
- Restaurant invoices are paid by the coordinator on site
- Other costs:
 - *Ukrainian partners*: to be announced in advance, reimbursed cash on receipt during the meeting
 - *EU partners*: bank transfer on receipt after the meeting

Seminars for students (St.)



**KNEU: 10 / Ivano-Frank.: 5 /
Lviv: 10 / IVET: 2 / IPQ: 0 / Valenica: 1 /
Vienna: 1 / Konstanz: 2**

Seminars for university teaching staff (Doz.)



**KNEU: 5 / Ivano-Frank.: 4 / Lviv: 5
IVET: 4 / IPQ: 2 /
Valenica: 3 – 1 / Vienna: 4 – 1 /
Konstanz: 3 – 2**

Special mobility strand



**KNEU: 2 (Vienna+Valencia)
Ivano-Frank.: 2
(Konstanz+Valencia)
Lviv: 2 (Konstanz+Vienna)**

How to select the participants?

Guidelines from the EACEA / suggestions from the proposal



Special mobility strand:

Selection criteria:

- Profile matching with objectives of the project: participants must have a function in the area of teacher education (chair of pedagogy etc.)
- Matching language skills (German/English/Spanish)
- Priority for candidates who would go abroad for the first time
- Specific focus on less experienced target group
- Limitation of mobility activities per staff member: 1
- Exclusion of project staff members

Guidelines from the EACEA / suggestions from the proposal



Special mobility strand:

Selection procedure:

- Open communication that ensures the spreading of information to all the relevant teaching staff members
- Communication between applicants and hosting institution → draft mobility programme
- Selection decision by sending institution
- Rector of the respective university needs to give his approval
- Hosting institution needs to agree
- Appropriate documentation of the selection results

Guidelines from the EACEA / suggestions from the proposal



Special mobility strand:

Compulsory documents: *(some forms available on EACEA website)*

- Learning agreements (including overall objectives of the training period, activities to be carried out, added value represented by mobility, expected outcomes and impact)
- Inter-institutional agreements
- Individual staff agreements
- Mobility report written by participants after the stay (published on project website)

Guidelines from the EACEA / suggestions from the proposal



Special mobility strand:

Support by hosting institution:

- Drawing up programmes for the stay in collaboration with applicants
- Organisation of required tickets by coordinator
- Support in finding an accommodation in the host city
- Sending official invitations regarding visa issues
- Providing insurances according to the usual practice of the international offices of the hosting universities
- Appointing a contact person for each participant
- Feedback conversations with participants
- Development of evaluation survey to be filled in by the participants
- Monitoring of achievement of objectives of mobility
- Providing a certificate for the participants

Guidelines from the EACEA / suggestions from the proposal



Seminars for students:

Selection criteria:

- Preferably command of German or Spanish but English in any case
- Must be students with a teacher education profile

Selection procedure:

- Up to Ukrainian universities

**KNEU: 10 / Ivano-Frank.: 5 /
Lviv: 10 / IVET: 2 / IPQ: 0 /
Valenica: 1 / Vienna: 1 /
Konstanz: 2**

Guidelines from the EACEA / suggestions from the proposal



Seminars for university teaching staff:

Selection criteria:

- Should be lecturers of pedagogy in the respective universities
- In addition to scientific lecturers the seminars also will include administrative and political issues and counselling of students

Selection procedure:

- Up to Ukrainian universities

**KNEU: 5 / Ivano-Frank.: 4 / Lviv: 5
IVET: 4 / IPQ: 2 /
Valenica: 3 – 1 / Vienna: 4 – 1 /
Konstanz: 3 – 2**

