

**PACTUM**

## **Project Management Handbook**

**Erasmus+ Programme**

**Key Action 2 “Capacity Building for Higher Education”**

**Grant agreement: 618888-EPP-1-2020-1-IT-EPPKA2-CBHE-JP**



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## Project information

<b>Acronym</b>	<b>PACTUM</b>
<b>Full name</b>	Projecting Academic Capacities with Tunisian Universities through Master courses
<b>Project No</b>	618888-EPP-1-2020-1-IT-EPPKA2-CBHE-JP
<b>Programme</b>	EPPKA2 - Cooperation for innovation and the exchange of good practices
<b>Action</b>	CBHE-JP - Capacity Building in higher education - Joint Projects
<b>Coordinator</b>	USIENA
<b>Project start date</b>	15/01/2021
<b>Project duration</b>	36 months

## Document Control Sheet and Classification





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## 1. Introduction

PACTUM is a capacity-building project aiming to develop a high-quality, multi-disciplinary and stimulating program in social, political and behavioral sciences. The target country of this project is Tunisia, a key partner for European Union Higher Education Institutions. Tunisian universities have recently undergone a remarkable transformation, which is bound to, and complements, the processes of modernization and democratization of the political system. Academic cooperation in a delicate and rapidly evolving field like that of social sciences – and in particular those disciplines which are central to the formation of future ruling classes and higher civil servants – is a crucial test for prospective cooperation among Tunisian HEIs and European HEIs engaging with capacity building activities.

The goals of the project – exchange of degree planning experiences in the field of social sciences, organization of preparatory summer schools, design of a vocational master's course and involvement of social actors and public administration – converge on the crucial need to boost positive impact on students and mutual enrichment between European and Tunisian academics.

This Handbook – a document for internal dissemination – offers all the project partners instruction on how to organize, implement and disseminate the activities.

The fundamental references inspiring this document are The Erasmus+ programme, aims and general objectives, the EACEA guide-lines for CBHE projects, the priorities for Tunisia. The present handbook will draw on a number of rules defined by the Pactum Grant Agreement and by the partnership Agreement.

This Handbook aims at thoroughly describing the procedures to be adopted by the consortium for communication, reporting, and managing activities. It includes a risk management table, the conflict resolutions strategy, legal aspects, IPR, consistently with agreements taken through Partnership Agreements.

The present document has been drafted by the coordinating team, with the active participation of all the partners. All beneficiaries will therefore comply to the procedures agreed within the network and described in the Pactum handbook.





## 2. Project Info

### Members

Programme Countries' Institutions		
UNIMED	UNIMED	Italy
University of Granada	UNIGR	Spain
University of Montpellier	UMON	France
University of Siena	USIENA	Italy
Partner Countries' Institutions		
Ministry of Higher Education and Scientific Research	MHESR	Tunisia
University of Carthage	UCAR	Tunisia
University of Kairouan	UNIK	Tunisia
University of Sfax	USF	Tunisia
University of Sousse	US	Tunisia
University of Tunis El Manar	UTM	Tunisia

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### 3. The Governance



The governance structure of the project has been elaborated in order to guarantee the effectiveness of management processes and the procedures based on the principle of internal democracy. These perspectives produce the right balance between:

- 1) effectiveness, efficiency and sustainability in the management process.
- 2) guarantees of maximum inclusion of all partners in decision-making and broad publicity and transparency in the development of the project and budget management.

Efficiency and sustainability in management are ensured by:

- operational bodies composed of a restricted number of members (Panels);
- attribution of a role of conflicts arbitrator to a body of three members
- concentration of meetings of the Assembly and the Committees, whenever possible, with periods of scheduled events
- provision of a project management and monitoring plan, on the basis of which the Assembly will constantly verify the status of the project's objectives and suggest the necessary corrective actions.



The guarantee of maximum inclusion, publicity and transparency is ensured by:

- The meeting of the Assembly once a year, to share the achievements and progress of the project.
- The publication on the project website of all approved proposals and, in their reserved area, the working documents.
- The joint composition of the bodies and the Governing structure.

#### Governance Structure: functions and composition

**Assembly:** composed of one member from each Project Partner and Chaired by USIENA (Project Coordinator). The Assembly will meet once a year (2021, 2022 and 2023) to share the achievements and progress of the project and propose comments, suggestions, adjustments.

**Steering Committee:** composed by 5 members: one representative of a European University, two representatives of Tunisian Universities, one representative of UNIMED as permanent member, and one representative of the Ministry of Higher Education and Scientific Research. Members will rotate on annual basis and they will be appointed at the kick off meeting and during the annual meeting of the Assembly. The Steering Committee act as support and advisory body in close collaboration with the Project Management Office.

**Project Management Office (PMO):** Chaired by the Coordinator, a representative of the Tunisian Universities, a member of UNIMED. The PMO members will be proposed by USIENA after consultation with the Steering Committee and appointed at the first working meeting (kick off meeting) by the Assembly. It will have a supervisory function over all the phases of the project as well as being in charge of coordination among all its governing bodies, and has the direct responsibility of all the procedures and results. The PMO convene face to face during the Annual Assembly meeting and work periodically via teleconference sharing documents via clouding and the project website.

#### Decision process modalities

Majority will take all decisions in the organs. In case of a tie, the vote of the Coordinator in the Assembly will have double value.

At the first working meeting (kick off meeting) all the organs will be appointed and the operating regulations will be adopted, which will regulate the venue of the meetings, the use of telematics instruments and all the other practical and logistic aspects.

Indicators for monitoring the Governance Structure are:

- n. of nominated organs
- approved operating rules

#### Management procedures and monitoring

The PMO, chaired and supported by USIENA (WP Leader) ensures the good management of the project. All the procedures and monitoring phases will be coordinated by the PMO and



approved by the Assembly. A consortium agreement, that includes the financial regulation of the Project, will be proposed by the PMO and approved by the Assembly during the kick off meeting. Internal reports on the Management and internal financial reports will be prepared by the PMO, circulated among partners and made available electronically via the Project Website.

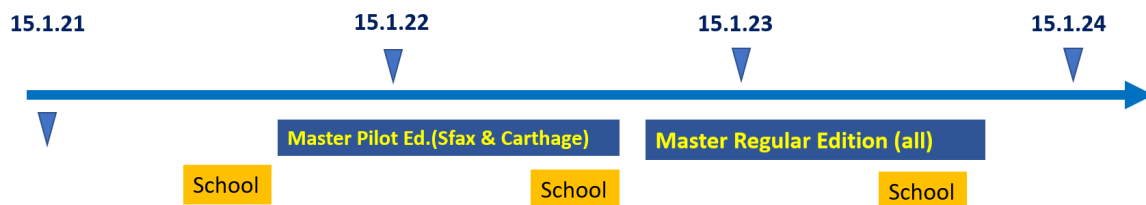
The PMO, represented by the Chair (USIENA), will be responsible for interface and reporting with the EACEA and the European Commission whenever requested.

Indicators for Management procedures are:

- n. of meetings (both face-to-face and via teleconference)
- Finalization of Consortium agreement
- n. internal reports approved
- n. solved conflicts or criticalities

### Schedule of Working packages and development of the project

The general schedule of the PACTUM project activities is illustrated in the stylised Gantt chart below



In short, three cycles of summer schools (in all the Tunisian HEIs involved) and 2 editions of the Master's program will have to be launched and implemented during the 36 months of activities. In order to ensure the correct achievement of these activities and an adequate work of dissemination, oriented to maximise the impact on students and academic communities, the work of the project will be prepared and conducted following a systematic set of milestones and preparatory phases. The whole procedure, including working packages and is summarised in the figure below:







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## PREPARATION: NEEDS ANALYSIS AND BEST PRACTICES

- 1.1. Needs Analysis
- 1.2. Catalogue of best practices in social, political and behavioural sciences
- 1.3. Position paper on policy reforms in social, political and behavioural sciences at the academic level



## DEVELOPMENT: SUMMER SCHOOL AND MASTER'S DESIGN

- 2.1. Scientific Committee: appointment and meetings
- 2.2. Summer School info package
- 2.3. Master's course info package
- 2.4. Recruitment strategy guidelines report
- 2.5. Professor Working Packages



## DEVELOPMENT: MASTER'S COURSE

- 3.1. Lectures and activities
- 3.2. Alumni Association
- 3.3. Thesis defense
- 3.4. Evaluation report



## DEVELOPMENT: SUMMER SCHOOL

- 4.1. Summer school activities
- 4.2. Summer school evaluation
- 4.3. Summer school communication

## QUALITY PLAN

- 5.1. Manual of data and methods
- 5.2. Mid term evaluation
- 5.3. Final evaluation



## DISSEMINATION

- 6.1. Communication strategy
- 6.2. Website and social network profiles
- 6.3. Dissemination events
- 6.4. Final event

## MANAGEMENT

- 7.1. Handbook of management structure and procedures
- 7.2. Monitoring and evaluation plan
- 7.3. Internal reports
- 7.4. Meetings organization and coordination



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In order to ensure that the plan is effectively executed, the preparatory steps are followed and the milestones are achieved, a number of deliverables have been selected for each of the Working Packages.

A number of deliverables are planned in order to ensure the effectiveness of the operational and financial management. These are to be produced by USIENA and consist in the following:

- 7.1. Handbook of managing structure and procedures
- 7.2. Monitoring and evaluation plan
- 7.3. Internal reports

The preparatory phase will include three deliverables which will be at the core of the work of the other partners and the overall quality of the project. These are:

- 1.1. Needs Analysis Report
- 1.2. Catalogue of good practices in social, political and behavioural sciences
- 1.3. Position paper on policy reforms in social, political and behavioural sciences at the academic level

Following the preparatory meetings and outputs, the development stage will include the creation of structures and curricula of the academic programs, as well as activities of dissemination. This phase will include:

- 2.2. Summer School info package
- 2.3. Master's course info package
- 2.4. Recruitment strategy guidelines report
- 2.5. Professor Working Package
- 3.4. Evaluation report
- 4.2. Summer school evaluation report
- 5.1. Manual of data and methods
- 5.2. Mid term evaluation report
- 5.3. Final evaluation report
- 4.3. Summer School communication material
- 6.1. Communication strategy report
- 6.2. Website and social media profiles





#### 4. *Obligations and Responsibilities*

##### *Obligations and role of the beneficiaries*

The term *beneficiary* refers to all the partner institutions including the coordinator.

Beneficiaries are jointly responsible for carrying out the activities attributed to them, and shall conduct the work in accordance with the work programme and schedule set forth in the Grant Agreement. They will work to the best of their abilities to achieve the defined results, taking full responsibility for their work, in accordance with accepted professional principles.

Beneficiaries will undertake to comply with all the provisions of the Grant Agreement and its annexes, with the provisions of Partnership Agreement, as well as with EU and national legislations.

Beneficiaries are jointly responsible for complying with any legal obligations incumbent on them jointly or individually. They will provide staff, facilities, equipment and material to the extent needed for executing the activities as specified in the work programme.

Beneficiaries will be responsible for the sound financial management and cost efficiency of the funds allocated to them. Moreover, they will commit to comply with the principles set out in the Erasmus Charter for Higher Education (ECHE) and to implement the student and staff mobility flows in accordance with the provisions set out in the Erasmus+ Programme Guide and the Guidelines for the Special Mobility Strand.

Beneficiaries will commit to sign Institutional Agreements between the sending and the hosting institutions for the preparation, implementation, monitoring and recognition of the mobility flows.

##### *Specific obligations and role of the project coordinator*

University of Siena, the project coordinator, commits to be responsible for the overall coordination, management and implementation of the project, in accordance with the Grant Agreement.

The project coordinator will be the intermediary for all communication between the beneficiaries and the Executive Agency, and inform the beneficiaries of any relevant communication exchanged with the Executive Agency.

The project coordinator will inform the beneficiaries of any changes connected to the project or to the Grant Agreement, or of any event likely to substantially affect the implementation of the action. Moreover, as the sole recipient of payments on behalf of all beneficiaries, it will transfer funds to the beneficiaries without unjustified delay and in accordance with the dispositions for payments provided by the Partnership Agreement.

The project coordinator will manage and verify the appropriate spending of the funds in accordance with the dispositions of the Grant Agreement and this Handbook. It will comply with all reporting requirements *vis-à-vis* the Executive Agency; it will make payment requests on behalf of the beneficiaries.

Finally, the project coordinator will provide the beneficiaries with official documents related to the project, such as the signed Grant Agreement and its annexes, the Guidelines for the Use of the Grant, the various reports templates and any other relevant documents concerning the project.



The copies of all reports submitted to the Executive Agency, as well as copies of any feedback letters received from the Agency following report assessment and field monitoring visits, will be transmitted to the whole network by the project coordinator.

*Specific obligations and role of each beneficiary (excluding the coordinator)*

Each beneficiary commits to ensure adequate communication with the coordinator and with the other beneficiaries. All the beneficiaries will support the coordinator in fulfilling its tasks according to the Grant Agreement.

Each beneficiary will submit to the coordinator, in due time, all relevant data needed to draw up the reports, financial statements and any other documents provided for in the Grant Agreement, as well as all necessary documents in the events of audits, checks or evaluations;

Each beneficiary will provide the coordinator with any other information or documents it may require and which are necessary for the management of the project.

Each beneficiary will notify the coordinator of any event likely to substantially affect or delay the implementation of the action, as well as of any important deviation of the project (e.g. replacement of the project contact person, changes in partner's budget, deviations from work plan etc.).

Each beneficiary will inform the coordinator of any change in its legal, financial, technical, organisational or ownership situation and of any change in its name, address or legal representative.

Each beneficiary will comply with Erasmus+ and national rules, including rules on public procurement, state aid publicity and equal opportunities.

*Ownership and property rights*

The ownership of all project results, including copyrights and intellectual property rights, as well as

all reports and other documentation resulting from the action, shall be vested in the beneficiaries, in compliance with the dispositions of the Grant Agreement.

Materials produced within the context of the project working packages may be only used within the scope of the project as templates of good practice. Copyrights shall be strictly safeguarded and permission for reproduction and scale of production has to be settled beforehand.

The beneficiaries must also be aware that the Agency and the Commission has the rights to communicate the results of the action by any other types of communication not specified in the General Conditions and re-write the results of the action in a different way, including shortening, summarizing, modifying the content, correcting technical errors in the content. Moreover, the Commission can cut, insert meta-data, captions or other graphic, visual, audio or word elements in the results of the action and extract a part (e.g. audio and video files) of, divide into parts or compile the results of the action, prepare derivative works of the results of the action.

The beneficiaries are aware of the right of the Commission to translate, insert subtitles in, dub the results of the action in all official languages of EU, authorize or sub-license the modes of exploitation set out above to third parties.



The Agency and the Commission shall have the rights of use specified in the General Conditions and set out above for the whole duration of the industrial or intellectual property rights concerned.

*Conflict of interest*

According to the Partnership Agreement, the beneficiaries shall take all necessary measures to prevent any situation where the impartial and objective implementation of the Agreement is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest (“conflict of interests”). Any situation constituting or likely to lead to a conflict of interests during the implementation of the Agreement shall be notified to the Agency, in writing, without delay. The beneficiaries shall immediately take all the necessary steps to rectify this situation. The Agency reserves the right to verify that the measures taken are appropriate and may require additional measures to be taken within a specified deadline.





## 5. Financial Management

This section of the handbook describes the financial rules and principles for the management of the grant. The first sub-section focuses on the general financing principles and provisions Applicable to the grant. The second one defines the procedures for budget amendments. The third sub-section covers the issues of payment arrangements and reimbursement procedure amongst project beneficiaries. The fourth sub-section deals with the Eligibility of Costs and mention all the supporting documents that needs to be provided for every budget heading.

### General financing principles and financing rules

The maximum Erasmus+ grant contribution to the project for the contractual period covered by the Grant Agreement amounts to **EUR 981,810.00**.

The Erasmus+ grant contribution is awarded to the partnership under the form of:

- "reimbursement of actual costs" for Equipment and Subcontracting costs;
- "unit contribution" to the costs incurred for Staff costs, Travel costs and costs of Stay.

The grant is calculated on the basis of Actual costs for the budget headings Equipment and Subcontracting, and of Unit Costs for the budget headings Staff costs, Travel costs and Costs of stay.

According to the European Union Financial Regulation grants shall always involve co-financing. This means that the resources which are necessary to carry out the project shall not be provided entirely by the EU contribution.

In practical terms, the implementation of the PACTUM project may require other types of expenditures, not specifically foreseen and included in the budget of the grant (such as costs for dissemination, publishing, translation if not sub-contracted, overheads costs, bank fees etc.), that are supposed to be covered by co-financing. It is important to note that these expenditures covered by the co-financing will not be taken into account for the final calculation of the grant and therefore will not have any financial impact on it.

### Modification to the Budget

As specified in Grant Agreement, the coordinator may, after consultation with the partner institutions, adjust the estimated budget. This procedure, regulated by the partnership agreement, will be held by transferring resources between budget headings. Budget changes will be possible if two conditions will be respected:

- Each budget adjustment will not affect the implementation of the action and the overall expenditure limits
- the amount indicated in the Grant Agreement for one or more of the budget headings will be not increased by more than 10 %.

### Payment cycle

Upon entering into force of the Grant Agreement, a pre-financing payment of 50% of the maximum amount was paid to the coordinator.



A second pre-financing payment of 40% of the maximum amount specified in the Grant Agreement shall be paid to the coordinator, subject to the following conditions:

- having used at least 70% of the previous pre-financing installment paid;
- Having produced the receipt of the "Statement on the use of the previous pre-financing installment" and "Request for payment" as specified in Annex VI of the Grant Agreement;
- Having produced the receipt of a progress report on implementation of the action as specified by the Grant Agreement.

According to the Grant Agreement, a substantial obligation to comply with the publicity provisions has to be respected by all the beneficiaries. The Agency may reduce the grant initially provided if the action is implemented poorly, partially or late. Such penalties shall be applied in case the final technical report provides evidence that the project implementation was not addressed with the required attention and according to the terms laid down in the Agreement. The final report and the outputs produced by the project (publications, conference papers, presentations etc.), will be assessed using a common set of quality criteria based on the same evaluation criteria and the same scoring scale as those used application stage: relevance (maximum 30 points); quality of the project (design and) implementation (maximum 30 points); quality of the project team and cooperation arrangements (maximum 20 points); and impact and sustainability (maximum 20 points).

#### *Elegibility of costs, Budget documentation and templates*

All the documentation concerning the financial transactions of PACTUM will have to be shared with the project coordinator by all the actors involved. The former will have to preserve the budget documentation for any audit request from the European Commission.

Each partner has to submit a Partner Financial Report whose approval will be the basis for issuing the next installment (see below section *Reporting*). On the basis of verified expenses in the report and their approval by the PMT, the amount of next installment of Erasmus+ grant will be defined/calculated by the Coordinator, in accordance with the Partnership Agreement.

For the purpose of transferring installment of the Erasmus+ grant contribution, the beneficiary will send a "Partner Request for payment", duly signed by the legal representative of the beneficiary, for each installment defined/calculated by the coordinator on the basis of the previously verified expenses.



**The sending procedure for the “Request for payment” will be as follows:**

- a scanned version of the request for payment must be sent to the general e-mail address for PACTUM project: [pactum@unisi.it](mailto:pactum@unisi.it)
- One hard copy of the same document must be sent by post to the following address:

Luca Verzichelli –  
PACTUM Project – Università di Siena  
Via Mattioli 10 – 53100 Siena  
Italia

*6. Communication*

Internal communication

A first crucial system of communication concerns the exchanges between coordinator and partners. The project coordinator will ensure the effectiveness of such a system by nominating a responsible for communication to partners and identifying one (or more) key contact person(s) in each institution involved. A general email address ([pactum@unisi.it](mailto:pactum@unisi.it)) will be created in order to keep all the partners updated on project progress and upcoming issues. Moreover, the official web page of the project will include a section devoted to internal communication.

External communication

The above-mentioned Pactum official website will serve as main source of external communication. This will be a fundamental tool, both to attract the students’ attention and to bring potential participants to the summer schools and to the master’s program, thus maximising the effects of the project, and for its long-term disseminative goals.

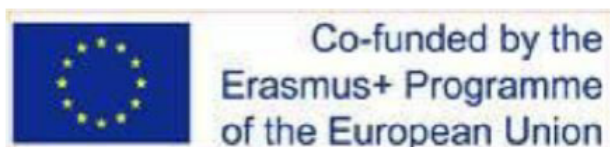
Publicity obligations

In accordance with the dispositions of the Grant Agreement, regarding the publicity and use of the relevant logos, the beneficiaries shall follow the instructions available on the Erasmus plus website on the following link: <https://eacea.ec.europa.eu/about-eacea/visual-identity>. Any communication, publication or output resulting from the project, made by the beneficiaries jointly or individually, including at conferences, seminars or in any information or promotional materials (such as brochures, leaflets, posters, presentations, etc.), must indicate that the project has received European Union funding.

Where the action, or part of the action, is a publication, **the mention and graphic logos must appear on the cover of the first pages** following the editor’s mention. If the action includes events for the public, signs and posters related to this action must be displayed.

**The following Erasmus+ logo must be present in each output of the project:**





When displayed in association with another logo, the European Union emblem must have appropriate prominence.

The following official logo of the project will be also present in each official outcomes of the project:

Moreover, a second logo will concern the specific deliverables and official communication concerning the launch of a new master degree in five Tunisian universities:



Any publication should mention the following disclaimer:

*This project has been funded with support from the European Commission. This publication [communication] 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"*

For other official EU language versions, please consult the following website:

[http://ec.europa.eu/dgs/education\\_culture/publ/graphics/beneficiaries\\_all.pdf](http://ec.europa.eu/dgs/education_culture/publ/graphics/beneficiaries_all.pdf)

## 7. Reporting

Reporting on the project's progress and achievements is a fundamental aspect of the management process. Moreover, a correct and timely reporting will facilitate the identification of criticalities and points of strength during the implementation of the project, thus maximizing the impact on students participating to summer schools and to the master's course.

Three types of reporting are considered by the present handbook:

- **Formal reporting** by the Coordinator to the Executive Agency, including Intermediate and Final Reports. This Activity will follow the general guidelines provided by the European Commission and recalled in the Grant Agreement.
- **Internal reporting within the Consortium.** This type of reporting is designed to share information comprehensively among the partners of the project. Beneficiaries will inform the Coordinator about the technical progress of the institution's implementation of the project and partners' financial reports with declaration of expenses incurred accompanied by the necessary supporting documents. The technical reports will be the



basis for preparation of the Intermediary report (halfway through the project's implementation period) and the Final Report (at the end of the project) that will be delivered to EACEA by the Project Coordinator.

Verification of expenditures declared in partners' financial reports are linked to the transfer of the part of Erasmus plus grant to partners from the Coordinator.

- **Reporting on different events carried out** (info days, workshops, seminars, conferences, meetings, trainings, etc.) by all beneficiaries.

The next sub-sections will describe the characteristics of these three different types of reporting outputs in detail.

#### Formal reporting by the coordinator to the executive agency

The assessment of the reports enables the Agency to take a decision on the continuation of the project. Beneficiaries are required to submit a Progress and a Final report. Approval of the Progress report leads to the launch of the second pre-financing payment and approval of the Final Report leads to the final payment (if due).

The Progress report provides the Agency with an update on how the project is advancing. The progress report on the implementation of the action will have to be submitted at the latest half way through the eligibility period.

The reporting forms for the progress report on the implementation consist of the following:

- "Progress report on the implementation of the action" (description of the progress made, statistics and indicators, tables of achieved/planned outcomes, etc.);
- "Summary report for publication" ;
- "Statement on the use of the previous pre-financing installment", represents an overall financial overview of the use of the grant until the date of the submission of the progress report;
- 

**The coordinator is responsible for submitting in due time to the Executive Agency all reports and financial statements as required in the Grant Agreement. For this purpose, and in a timely manner, the beneficiaries commit to provide the coordinator with all necessary information and copies of supporting documents needed for drawing up reports, financial statements and any other documents required the coordinator. It is a contractual obligation that has to be fulfilled by all the beneficiaries.**

The Final report will have to be submitted at the latest two months after the end of the contractual period.

The report forms for the final reporting consist of a narrative and a financial part as follows:

- "Final report on the implementation of the action" (description of the results and achievements, statistics and indicators, table of achieved outcomes, etc.);
- "Summary report for publication"
- "Final Financial Statement and Request for payment" - including the financial tables for each budget heading and the required supporting documents;





- Mandatory (Audit) Certificate on the financial statements and underlying accounts ("Report of Factual Findings on the Final Financial Report – Type II") as specified by the Grant Agreement.

Internal reporting within the consortium

Reporting schedule is given in the table below.



Reports (two in total) prepared by the coordinator to be delivered to EACEA	Intermediate report-	Final report-		
Partners' financial reports	1st report -	2nd report -	3rd report -	4th report -
Partner's technical report on the implementation of the project (two reports)	1st report -	2nd report-		

**Each partner has to respect the above reporting deadlines (also stated in the Partnership Agreement), and submit their reports with supporting documents on validation of expenditure to the project coordinator in due time as requested. If they are not submitted to the coordinator within the set deadline, they will not be included in the progress report of the project that coordinator is responsible to deliver to the Executive Agency.**

The coordinator shall provide the beneficiaries with the appropriate reporting forms for the declaration of expenses/activities and the respective instructions for their completion (XXX). These reports must be drawn up in EUR. The beneficiaries are fully responsible for the correct delivery of the declaration of the expenses and for appropriate application of the account system.

The beneficiaries shall keep a record of any expenditure/activity incurred under the project and all proofs and related documents for a period of 5 years after the payment of the final balance under the Grant Agreement. The coordinator may reject any item which cannot be justified in accordance with the rules set out by the Executive Agency in the Grant Agreement and in the Guidelines for the Use of the Grant.





### Partner's financial reports

Partner financial reports are linked to transfer of installments of the Erasmus+ grant by the Coordinator.

The Coordinator can submit Final report, as well as financial statements to the EACEA on behalf of all beneficiaries only based on inputs received from all partners. Therefore, in order to provide adequate information on the expenditure made within the project, each beneficiary has to submit a partner financial report to the Coordinator

The financial report will consist of:

- Financial statement presenting the costs incurred during the reporting period;
- Supporting documents (staff conventions, individual travel reports and project time sheets) as original hard copies, and other supporting documents (agendas, list of participants, boarding passes, travel orders, or any other document proving mobility or participation in some activities) as hard copies.

When preparing the financial report, the beneficiaries are required use the Excel file provided by the EACEA Final Financial Statement (XXX), filling in the relevant sheets:

- Final Financial Statement
- Staff costs table
- Travel costs & costs of stay table
- Equipment costs table (only for the target countries higher education institutions)
- Subcontracting costs table (only for institutions having this foreseen in budget)
- Co-financing table

**In case the beneficiary does not provide all reports with appropriate and accurate information therein, together with financial statements and copies of supporting documents within 10 working days from the relevant date, the coordinator will inform the beneficiary's contact person for administration about this via email, with the beneficiary's project contact person in carbon copy. Failure to provide all requested documents and information within 10 working days from the date of coordinator's notice will result in suspending further installments of the Erasmus+ grant contribution to the beneficiary. The coordinator reserves the right to consult the Executive Agency if the activities declared by beneficiary and/or delivered outputs are questionable.**

The partner financial reports will be reviewed by the PMT, taking into consideration eligibility of costs, financial principles and provisions, adequacy of supporting documents, correctness of applied exchange rates (as defined in this Guide) and tangible outputs provided in line with project work plan. Expenditures must be in conformity with the estimated Budget in accordance with the Partnership Agreement and project budget. The approval of the report is the basis for the transfer of next instalment to the partner institution.



### Partners' technical reports

The Technical reports should provide the clear picture on the progress of project activities, time and quality of deliverables and results, to what extent the progress indicators are achieved, as well as introduction of changes into the work plan (if any).

For technical reporting, partners should use Technical report describing the activities carried out and their results during the reporting period.

The Technical report is structured as follows:

- Short recall of the goals of the partner;
- Statistics and indicators. All kinds of information useful to get an idea of performance for the period covered by the reporting period;
- Table of achieved/planned results (one table per Work Package), the indicators of achievement and or/performance as indicated in the project proposal;
- Qualitative report on specific activities carried out to date to achieve the result;
- Activities still to be carried out to achieve the outcome (before the end of the project);
- Specific and measurable indicators of achievement/progress
- Changes that have occurred in the result since the original proposal (any proposed changes, including new people involved, budget changes, modification of activities).





## 8. Annexes

A1: Technical report

# Partner's Technical Report

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Partner: \_\_\_\_\_

Date: \_\_\_\_\_

### 1. Short recall of partner's goal:





2. Statistics and indicators of progress:

3. Table of achieved/planned results:

Result	Date achieved	Date of planned achievement



4. Qualitative report on specific activities carried out to date:

5. Activities to be carried out to achieve the outcome:







6. Specific and measurable indicators of achievement/progress

7. Changes that have occurred in the results since the original proposal (any proposed changes, including new people involved, budget changes, change of activities)





## A2 - CBHE Joint Declaration

<b>JOINT DECLARATION</b>	
Ref. No. ....	Project No. ....
The reference number must correspond to the progressive numbering indicated in the financial statements of the final report	

FROM .....  
Hereinafter "the Institution"

AND Name: .....  
Address: .....  
Hereinafter "the Staff member"

**THE INSTITUTION AND THE STAFF MEMBER HEREBY CERTIFY THAT:**

- The Institution is a member of the partnership for the above-mentioned project.
- The Staff member is either:  
- employed by the Institution YES/NO  
or  
- a natural person \*\* assigned to the project on the basis of a contract against payment YES/NO
- 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>
<b>FROM</b>		<b>TO</b>	

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, Trainer / Technician / Administrative staff)	
Country of the Institution	
Number of days worked and charged to the project (according to time-sheet)	

5. This declaration does not alter in any way the employment conditions/assignment already existing between the Institution and the Staff member and is established solely for the purpose of justifying the Staff costs that the Institution will charge to the Erasmus+ Capacity Building in Higher Education grant.

Done in ..... Date .....

Name.....

Function.....

Institution ..... Staff member name.....

Signature and Stamp of the Institution Signature of the Staff member

*\*The declaration must be signed by the person concerned, then signed and stamped by the person responsible in the Institution where this person worked for the project. The Institution must be a member of the partnership.*

**\*\* A natural person (individual) can be assigned to the action also on the basis of e.g. a civil contract, a free-lance contract, an expert contract, a service contract with self-employed person ("in house consultant) or a secondment to the Institution against payment. The costs of such natural persons working under the action may be assimilated to the costs of personnel, if:**

*(i) the person works under conditions similar to those of an employee (in particular regarding the way the work is organised, the tasks that are performed and the premises where they are performed); and*

*(ii) the result of the work belongs to the Institution (unless exceptionally agreed otherwise); and*

*(iii) the costs are not significantly different from the costs of staff performing similar tasks under an employment contract within the institution*



## A3 - Individual Travel Report

### 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: .....  
Home institution: .....  
Staff position/student year of study at home institution: .....

#### (2) TYPE OF ACTIVITY (Tick as appropriate)

##### STAFF

- Teaching/training assignment  
 Training and retraining purposes  
 Updating programmes and courses  
 Practical placements in companies, industries and institutions  
 Project management related meetings  
 Workshops and visits for result dissemination purposes

##### STUDENTS

- Study period  
 Participation in intensive courses  
 Practical placements, internships in companies, industries or institutions  
 Participation in short term activities linked to the management of the project

#### (3) DETAILS OF THE TRAVEL

<b>PERIOD*</b>	From (Depart date) (dd/mm/yy)	To (Return date) (dd/mm/yy)
<b>PLACE OF DEPARTURE**</b>	HOME INSTITUTION .....	
	COUNTRY..... CITY.....	
<b>PLACE OF DESTINATION/ LOCATION OF ACTIVITY</b>	HOST INSTITUTION .....	
	COUNTRY..... CITY.....	
<b>TRAVEL DISTANCE***</b>	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: [https://ec.europa.eu/erasmus-plus/resources/distance-calculator\\_en](https://ec.europa.eu/erasmus-plus/resources/distance-calculator_en)) from place of departure to location of activities

#### (4) DETAILS OF THE ACTIVITY

<b>DATES (excluding travel)</b>	<b>From (date):</b> ..... <b>To (date):</b> .....
<b>DESCRIPTION OF ACTIVITY(IES) PERFORMED</b> (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: .....



#### A4 - Contact list

Name and Surname	Institution	Email address
Lobna ZAKRAOUI	University of Tunis El Manar	<a href="mailto:Lobna.zakraoui@utm.tn">Lobna.zakraoui@utm.tn</a>
Khalifa Harbaoui	University of Tunis El Manar	<a href="mailto:Khalifa.harbaoui@utm.tn">Khalifa.harbaoui@utm.tn</a>
Selmi Wafik	University of Kairouan	<a href="mailto:swafik@gmail.com">swafik@gmail.com</a>
Tahar Jallouli	University of Carthage	<a href="mailto:tahar.jallouli@gmail.com">tahar.jallouli@gmail.com</a>
Hajer Ferchichi	University of Carthage	<a href="mailto:ferchichi.hajer85@gmail.com">ferchichi.hajer85@gmail.com</a>
Fatma Ghorbel	University of Sfax	<a href="mailto:fatma.ghorbel@usf.tn">fatma.ghorbel@usf.tn</a>
Hichem Romdhani	University of Sousse	<a href="mailto:hichem.el.romdhani@gmail.com">hichem.el.romdhani@gmail.com</a>
Latifa Kechiche	University of Sousse	<a href="mailto:latifakechiche1@gmail.com">latifakechiche1@gmail.com</a>
Emilio Regueira Martínez	University of Granada	<a href="mailto:ipedreira@ugr.es">ipedreira@ugr.es</a>
Elodie Ernoult	University of Montpellier	<a href="mailto:elodie.ernoult@umontpellier.fr">elodie.ernoult@umontpellier.fr</a>
Christophe Roux	University of Montpellier	<a href="mailto:christophe.roux@umontpellier.fr">christophe.roux@umontpellier.fr</a>
Eugenio Platania	UNIMED	<a href="mailto:e.platania@uni-med.net">e.platania@uni-med.net</a>

