

# TAILOR-MADE TRAINING

## EQUINET TRAINING SESSION

Helping Equality Bodies to apply for and use EU Funds



Co-funded by the Rights, Equality and Citizenship Programme of the European Union

 **Equinet**  
European network  
of equality bodies

September 3<sup>rd</sup> & 4<sup>th</sup>  
Sofia, Bulgaria



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**Welcome Notice to the participants!**

The Welcomeurope training sessions are known to be interactive and participants are free to intervene at any time during the training to be sure they understand all elements we provide to the audience. During this training, several moments to exchange and discuss are planned to enable you to get into details of your personal questions or projects.

**Practical arrangements:**

We are at your disposal to answer your practical, organisational concerns.

**You may use breaks to get some additional information or check-up the projects you're working on!**

During the lunch break, there is possibility to submit your projects and have a discussion on their eligibility in the European context.

Melissa Moothoo ([mmoothoo@welcomeurope.com](mailto:mmoothoo@welcomeurope.com)) can get you advice about the positioning of your organisation and its European strategy.

**After the training!**

Please, do not hesitate to contact us to discuss your (potential) projects.

Welcomeurope

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## EQUINET TRAINING SESSION

### “Helping Equality Bodies to Apply for and Use EU Funds”

Thursday 3<sup>rd</sup> (09:00 – 17:00) & Friday 4<sup>th</sup> September 2015 (09:00 – 13:15)

Location: Suite Hotel Sofia, 1A Yordan Yossifov Street, 1700 Sofia, Bulgaria



Training session delivered by

## OBJECTIVES OF THE TRAINING SESSION

The training session aims to:

- Discuss **challenges** encountered by equality bodies when applying for EU funds
- Provide guidance regarding **tips and pitfalls** to avoid when applying for EU Funds
- Give advice about **implementing EU-funded projects**
- Develop ideas on **building partnerships** with partner equality bodies and other types of organisations

## AGENDA

### DAY 1 (09:00 – 17:00)

|               |  |
|---------------|--|
| 08:45 – 09:00 | Welcome and registration of participants   |
| 09:00 - 09:30 | <b>Presentation of the programme and of the participants</b><br><i>Melissa Moothoo, Mission Director, WelcomEurope</i><br><i>Jessica Machacova, Project Officer, Equinet Secretariat</i>   |
| 09:30 – 10:15 | <b>SESSION 1: Identification of Intra-Community Programmes for Equality Bodies</b> <ul style="list-style-type: none"> <li>• Presentation of the <b>Rights, Equality and Citizenship Programme</b></li> <li>• Identification and presentation of <b>other appropriate programmes: PROGRESS and Human Rights, Education and Youth Programme</b></li> <li>• Identification of the <b>relevant managing authorities</b> of each programme</li> </ul> |
| 10:15 – 11:15 | <b>SESSION 2: Introduction to Structural Funds</b> <ul style="list-style-type: none"> <li>• Presentation of the <b>priorities of the programmes and cooperation with EU Countries</b></li> <li>• <b>Focus on two countries:</b> Bulgaria and France</li> <li>• Identification of the <b>relevant managing authority</b></li> <li>• <b>Essential principles and rules</b> in the selection of the projects</li> </ul>                             |
| 11:15 – 11:30 | Coffee Break   |

|               |   |
|---------------|---|
| 11:30 – 13:00 | <p><b>SESSION 3: Partnership and Application methodology</b></p> <ul style="list-style-type: none"> <li>• <b>Building a strong partners' network:</b> Mastering the principles of partnership in European projects, identifying relevant partners for one's project, formalizing the <b>partnership agreement</b></li> <li>• <b>Essential principles,</b> participation rules and trends of intra-community programmes – in terms of consortium, actions, processes...</li> </ul> <p><i>Testimonials from Equinet members (National Commission for the Promotion of Equality (Malta) and Commission for the Protection against Discrimination (Bulgaria) (TBC))</i></p> |
| 13:00 – 14:00 | <p><b>Lunch Break</b></p>   |
| 14:00 – 15:30 | <p><b>SESSION 4: The Logical Framework approach</b></p> <ul style="list-style-type: none"> <li>• Introduction</li> </ul> <p><b>Workshop - The Logical Framework</b></p> <ul style="list-style-type: none"> <li>• Preparation of a Logical Framework</li> <li>• Conclusion of the workshop</li> </ul>  |
| 15:30 – 15:50 | <p><b>Coffee Break</b></p>  |
| 15:50 – 16:50 | <p><b>SESSION 5: Budgeting rules</b></p> <ul style="list-style-type: none"> <li>• <b>Budgeting rules</b> specific to the identified programmes – formalisation of the budget form</li> </ul> <p><b>Workshop - Budgeting and intra-community funds</b></p> <ul style="list-style-type: none"> <li>• Preparation of a budget</li> </ul>   |
| 16:50 – 17:00 | <p><b>Evaluation of the first day by participants</b></p>   |
| From 18:10    | <p><b>Social Event:</b></p> <ul style="list-style-type: none"> <li>• <b>18:10:</b> Meeting in the lobby of the Hotel</li> <li>• <b>18:15 – 19:45:</b> Bus sightseeing tour of Sofia</li> <li>• <b>20:00:</b> Dinner in a traditional Bulgarian restaurant (<i>Izbite – 18, Hristo Belchev Street</i>)</li> </ul>  |

## DAY 2

|               |  |
|---------------|--|
| 09:00 – 09:30 | <p><b>Conclusion of the Workshop</b></p> <ul style="list-style-type: none"> <li>• Reporting by the group leader</li> <li>• Planning process – recommendations and good practices</li> <li>• Learning from Day 1 – Multiple choice questions</li> </ul>   |
| 09:30 – 10:30 | <p><b>SESSION 6: Evaluation and communication strategy</b></p> <ul style="list-style-type: none"> <li>• Evaluating the project: Who? When? How?</li> <li>• Outcomes and impact / capitalisation</li> <li>• The communication plan – How to communicate? How to disseminate?</li> </ul> <p><i>Testimonials from Equinet members (National Commission for the Promotion of Equality (Malta) and Commission for the Protection against Discrimination (Bulgaria) (TBC))</i></p> |
| 10:30 – 11:10 | <p><b>SESSION 7: Reporting on the project – showing the good use of the grant</b></p> <ul style="list-style-type: none"> <li>• Financial and administrative reporting</li> <li>• Payment procedure / Documentary evidence</li> <li>• Good financial practices / External aid specificities</li> </ul>  |

|               |   |
|---------------|---|
| 11:10 – 11:30 | <b>Coffee Break</b>   |
| 11:30 – 12:40 | <p><b>EXERCISE: Audit of a financial report</b></p> <ul style="list-style-type: none"> <li>• Participants, in the role of evaluators, will analyse a financial report and share their conclusions</li> <li>• Good practices and writing principles</li> </ul> <p><i>Testimonials from Equinet members (National Commission for the Promotion of Equality (Malta) and Commission for the Protection against Discrimination (Bulgaria) (TBC))</i></p> |
| 12:40 – 13:00 | <p><b>Conclusions</b></p> <ul style="list-style-type: none"> <li>• Last questions from participants</li> <li>• Roundtable evaluation</li> </ul>   |
| 13:00 – 13:15 | <p><b>Closing address</b></p> <p><i>Ms. Dzhumalieva, Chair of the Bulgarian Commission for Protection against Discrimination</i></p>  |
| 13:15 -14:15  | <b>Goodbye Lunch</b>  |








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Programme – DAY 1

**MORNING**

**SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES**

- Presentation of the Rights, Equality and Citizenship Programme
- Identification and presentation of other appropriate programmes
- Identification of the relevant managing authorities of each programmes

**SESSION 2 : INTRODUCTION TO STRUCTURAL FUNDS (FRANCE AND BULGARIA)**

- Presentation of the priorities of the programmes and cooperation
- Identification of the relevant managing authority
- Essential principles and rules in the selection of the projects

**SESSION 3 : PARTNERSHIP AND APPLICATION METHODOLOGY**

- Building a strong partners’ network
- Essential principles, participation rules and trends of intra-community programmes

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Programme – DAY 1

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**AFTERNOON**

**SESSION 4 : THE LOGICAL FRAMEWORK APPROACH**

- Introduction to the Logical Framework approach
- **WORKSHOP** - Preparation of a Logical Framework
- Conclusion of the workshop

**SESSION 5 : BUDGETING RULES**

- Budgeting rules specific to the identified programmes – Formalisation of the budget form
- **WORKSHOP** - Preparation of a budget
- Conclusion of the workshop

**Roundtable – Evaluation of the first day by participants**




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**PROGRAMME – DAY 2**





Co-funded by the Rights, Equality and Citizenship Programme of the European Union

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Programme – DAY 2

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**MORNING**

**SESSION 6 : THE EVALUATION AND COMMUNICATION STRATEGY**

- The evaluation plan of the project: Who? When? How?
- Outcomes and impact / Capitalisation
- The communication plan of the project – how to communicate? How to disseminate?


**SESSION 7 : REPORTING OF THE PROJECT – SHOWING THE GOOD USE OF THE GRANT**

- The financial and administrative reporting
- Payment procedure / Documentary evidence
- Good financial practices / External aid specificities

**EXERCISE: AUDIT OF A FINANCIAL REPORT**

- Participants, in the role of evaluators, will analyse a financial report and share their conclusions
- Good practices and writing principles

**CONCLUSION & QUESTIONS**




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**SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES**




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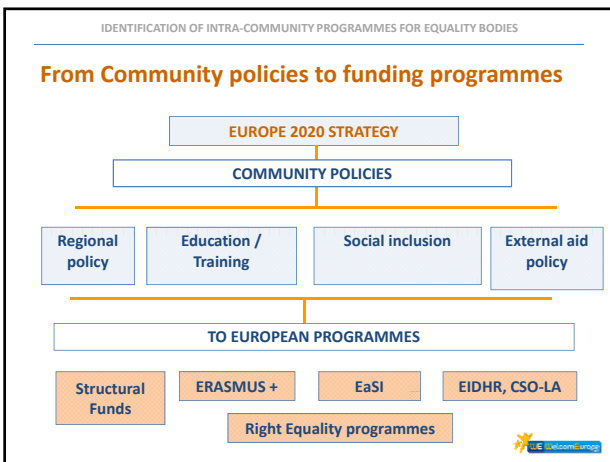
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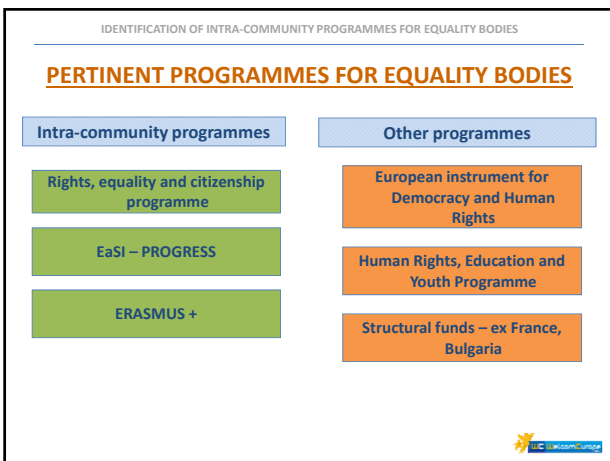
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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

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**PERTINENT PROGRAMMES FOR EQUALITY BODIES**

| Intra-community programmes                 | Other programmes                                   |
|--|--|
| Rights, equality and citizenship programme | European instrument for Democracy and Human Rights |
| EaSI – PROGRESS                            | Human Rights, Education and Youth Programme        |
| ERASMUS +                                  | Structural funds – ex France, Bulgaria             |




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

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**RIGHTS, EQUALITY AND CITIZENSHIP PROGRAMME**

**Managing Authority : DG JUSTICE**



**Global objective :** Contributing to the further development of equality and the promotion of the rights of people.

**Priorities :**

- Promote non-discrimination, data protection, consumer rights
- Combat racism, xenophobia, homophobia and other forms of intolerance
- Promote rights of persons with disabilities
- Promote equality between women and men and gender mainstreaming
- Prevent violence against children, young people, women and other groups at risk

➔ 439 million €




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

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**RIGHTS, EQUALITY AND CITIZENSHIP PROGRAMME**



**Types of funded actions :**

- Training activities (staff exchanges, workshops, development of training modules,...)
- Mutual learning, cooperation activities, exchange of good practices, peer reviews, development of ICT tools...
- Awareness-raising activities, dissemination, conferences,...
- Support for main actors (key European NGOs and networks, Member States' authorities implementing Union law,...)
- Analytical activities (studies, data collection, development of common methodologies, indicators, surveys, preparation of guides...)




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**RIGHTS, EQUALITY AND CITIZENSHIP PROGRAMME**



**Eligible countries :** All Member States, Iceland and Liechtenstein\*

**Application procedures :**

- ❖ Publication of the annual work programme in march 2016
- ❖ Application is done mainly through calls for proposals - 4 on-going calls for september/October
- ❖ Planned calls between September – November 2015 (9 calls in all)
- ❖ On-line submission through PRIAMOS system.

\*only for non-discrimination, racism, xenophobia, rights of persons with disabilities and equality between women and men...




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**RIGHTS, EQUALITY AND CITIZENSHIP PROGRAMME**



**Application forms : 3 mandatory templates for the grant application –**

Annex 1 : **Project Description and Implementation Form**  
*The template must be uploaded in the original Word format*

Annex 2 : **Budget**  
*The template must be uploaded in the original Excel format*

Annex 3 : **Partner/Associate Partner Declaration**  
*All the sections of the template shall be completed , signed and dated by the authorised signatory of the partner organisation and scanned. The Application package should contain one declaration for each partner.*




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**SPECIFICITIES OF THE PROGRAMME**

- ❖ The project must be transnational and must be submitted by a partnership of eligible organisations.
- ❖ Projects must not have started prior to the date of submission of the grant application.
- ❖ Most of the calls provides the maximum of the funding allocation
- ❖ Applicants and partners must have stable and sufficient sources of funding to maintain their activity throughout the period for which the grant is awarded
- ❖ The applicant must present its balance sheets and profit and loss accounts for the last two available years (not applicable for public bodies)
- ❖ The applicant and the partners must have sufficient operational and professional capacities to implement the activities for which co-funding is requested.




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**→ LINKS**


- [http://ec.europa.eu/justice/grants1/programmes-2014-2020/rec/index\\_en.htm](http://ec.europa.eu/justice/grants1/programmes-2014-2020/rec/index_en.htm)
- <http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1397223391719&uri=CELEX:32013R1381>
- [http://ec.europa.eu/justice/grants1/open-calls/index\\_en.htm](http://ec.europa.eu/justice/grants1/open-calls/index_en.htm)
- <http://ec.europa.eu/justice/grants/results/daphne-toolkit/en/browse-all-projects>

**→CONTACTS**

Paraskevi MICHOU – Director – DG justice  
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Renatas MAZEIKA – Head of Unit Unit A.4 : Programme management  
Tel: +32 2 29 62 152  
Email : EC-REC-CALLS@ec.europa.eu

**POSSIBILITIES ALSO THROUGH CALLS FOR TENDER !!!**




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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**PERTINENT PROGRAMMES FOR EQUALITY BODIES**

| Intra-community programmes                 | Other programmes                                   |
|--|--|
| Rights, equality and citizenship programme | European instrument for Democracy and Human Rights |
| <b>EaSI – PROGRESS</b>                     | Human Rights, Education and Youth Programme        |
| ERASMUS +                                  | Structural funds – ex France, Bulgaria             |




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**EASI - PROGRESS**

**Managing Authority : DG EMPLOYMENT**



**Global objective :**  
The PROGRESS axis of EaSI helps the EU and its countries to improve policies in three thematic sections:

- employment, in particular to fight youth unemployment;
- social protection, social inclusion and the reduction and prevention of poverty;
- working conditions.

**Budget : 919 million €**

61% of the total EaSI budget will be allocated to the PROGRESS axis. Between 15 and 20% of this quota will be dedicated to **social policy experimentation**, with the aim to further develop its potential for employment and social innovation.




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**EASI - PROGRESS**



**Types of funded actions:**

- Develop and disseminate high-quality comparative analytical knowledge.
- Facilitate effective and inclusive information-sharing, mutual learning and dialogue.
- Provide financial support to test social and labour market policy innovations.
- Provide organisations with financial support to increase their capacity to develop, promote and support the implementation of EU instruments and policies.




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**EASI - PROGRESS**



**Eligible countries :**

- EU countries;
- EEA countries, in accordance with the EEA Agreement, and EFTA countries;
- EU candidate countries and potential candidate countries, in line with the framework agreements concluded with them.

**The PROGRESS axis of EaSI is open to all public and/or private bodies, actors and institutions**

*It can support cooperation with international organisations, and in particular with the Council of Europe, the OECD, the ILO, with other United Nations bodies and with the World Bank.*




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**EASI - PROGRESS**



**Application forms :** through call for proposal published on the website of the DG employment and social affairs.

➔ Online submission on the indicated website :


<https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do>

*Example : Mobility experience for professionals*

**Deadline :** 16/10/2015

**Specificities of the call :**

- a) pay particular attention to vulnerable groups, such as young people;
- b) promote equality between women and men;
- c) combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation;
- d) promote a high-level of quality and sustainable employment, guarantee adequate and decent social protection, combat long-term unemployment and fight against poverty and social exclusion




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**EASI – PROGRESS - Other financing possibilities :**



**Call for tenders :**

Organisations from eligible countries can participate to call for tenders in the area of employment, social affairs and inclusion.

*Example : Study to collect updated information for a limited number of substances to analyse the health, socio-economic and environmental impacts on workers ...*

Deadline : 10/09/2015

The maximum amount of the contract is € 300,000

The tender guidelines gives information regarding the different tasks to be undergone, the deliverables and the budget available.

LINK: <http://ted.europa.eu>



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**EASI – PROGRESS - Other financing possibilities :**



**Call for interest :**

The European Commission is looking for independent experts with expertise in the policy areas of employment, social affairs and inclusion

Individuals can apply to these call for interest. Application is done on-line through the website <https://webgate.ec.europa.eu/swim/external/experts/protected/curriculum/edit.action>

Information to be provides : Curriculum vitae – fields of expertise– personal information – qualification

**If selected, the contract is due for a maximum of 5 years.**



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**→ LINKS**

1. <https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do>
2. <http://ec.europa.eu/social/main.jsp?catId=1081>
3. <file://serveur-ibm/travail/Travail1/2015%20FORMATION/FSM/EQUINET/KE-04-14-701-3A-N.pdf>
4. <http://ec.europa.eu/social/main.jsp?catId=1191&langId=en>

**→CONTACTS**

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Jacob RALF – Head of Unit  
Unité D.3 : Social Protection and Activation Systems  
Tel : +32 229-90483/87553



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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

### PERTINENT PROGRAMMES FOR EQUALITY BODIES

| Intra-community programmes                 | Other programmes                                   |
|--|--|
| Rights, equality and citizenship programme | European instrument for Democracy and Human Rights |
| EaSI – PROGRESS                            | Human Rights, Education and Youth Programme        |
| <b>ERASMUS +</b>                           | Structural funds – ex France, Bulgaria             |




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

### ERASMUS +

**Managing Authority :**  
**DG EDUCATION AND CULTURE and the EDUCATION, AUDIOVISUAL AND CULTURE EXECUTIVE AGENCY**

**Global objective :**  
 The new Erasmus+ programme aims to support actions in the fields of Education, Training, Youth and Sport for the period 2014-2020.

**The Education, training and youth strand is composed of 3 « Key actions » :**

- ⇒ Key Action 1: Transnational mobility of higher education and vocational training students and staff
- ⇒ Key Action 2: Cross border partnerships among education institutions, including companies (SMEs, corporations)
- ⇒ Key Action 3: The policy dialogue with relevant European stakeholders




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES


### ERASMUS +

**Types of actions funded for Key Action 2:**

1. **Capacity building in the field of youth**
2. **Strategic partnerships in the field of education, training and youth**

**Capacity building in the field of youth :**

- To improve the quality and recognition of youth work, non-formal learning and enhance their synergies with other education systems, the labour market and society
- To promote transnational non-formal learning mobility between Programme and Partner Countries targeting young and vulnerable people with fewer opportunities,




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**ERASMUS +**

**Among financed actions for capacity building in the field of youth :**

- Activities encouraging the policy dialogue, cooperation, networking and exchanges of practices. Large-scale youth events. Information and awareness campaigns
- Development of information, communication and media tools. Development of youth work methods, tools and materials and mobility activities
- Youth Exchanges between Programme and eligible countries. Mobility of youth workers between Programme and eligible Partner Countries.

Budget 2015 - 9 millions €




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**ERASMUS +**

**Types of actions funded for Key Action 2:**

1. **Capacity building in the field of youth**
2. **Strategic partnerships in the field of education, training and youth**



**Strategic partnerships in the field of education, training and youth**

- Developing new approaches to strengthen the education and training paths of prospective and practicing educators/youth workers
- Supporting innovative projects aimed to reduce disparities in learning outcomes affecting learners from disadvantaged backgrounds/with fewer opportunities




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**ERASMUS +**

**Among financed actions for capacity building in the field of youth :**

- Activities of cooperation between regional authorities to promote the development of education, training and youth systems and their integration in actions of local and regional development
- Activities to support learners with disabilities/special needs to complete education cycles and facilitate their transition into the labour market, including by combating segregation and discrimination in education for marginalised communities
- Activities to better prepare and deploy the education and training professionals for equity, diversity and inclusion challenges in the learning environment

Budget 2015- 302 millions €




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES


**ERASMUS +**



**Eligible countries :**  
ERASMUS + programme distinguishes between eligible countries and partner countries. Only eligible countries can be coordinator.

**Organisation of the programme:**  
The actions of the Erasmus + programme are divided into decentralised actions and centralised actions :

- The decentralised actions are managed in each programme country by National Agencies  
[http://ec.europa.eu/education/tools/national\\_agencies\\_en.htm](http://ec.europa.eu/education/tools/national_agencies_en.htm)
- The centralised actions are managed at a European level by the Education, Audiovisual and Culture Executive Agency (EACEA) located in Brussels.  
[http://eacea.ec.europa.eu/erasmus-plus\\_en](http://eacea.ec.europa.eu/erasmus-plus_en)




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**ERASMUS +**




**Application forms :**  
➔ Online submission on the indicated website :  
<https://webgate.ec.europa.eu/swim/external/protected/editSubvention.do>

Annex 1: **Project Description and Implementation Form**  
The template must be uploaded in the original Word format

Annex 2 : **Budget**  
The template must be uploaded in the original Excel format

Annex 3: **Declaration of honour**  
The template needs to be fill in and signed and uploaded on the submission platform.

Publication of the Annual work programme 2016 in 3rd Quarter 2015




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**ERASMUS + - Other financing possibilities :**




**Call for tenders :**  
Organisations from eligible countries can participate to call for tender

**Example :** Study on gender-based violence in sport.  
This study was initiated to better define and measure the scope of gender-based violence in professional and grassroots sports across the EU.

[http://eacea.ec.europa.eu/about-eacea/calls-for-tenders/study-gender-based-violence-in-sport-eacea201502\\_en](http://eacea.ec.europa.eu/about-eacea/calls-for-tenders/study-gender-based-violence-in-sport-eacea201502_en)

Deadline : 25/06/2015  
The maximum amount of the contract is € 300 000




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**OPEN call for tenders :**

**Study on the Contribution of Sport to the Employability of Young People in the Context of the Europe 2020 Strategy**

*The aim of this study is to examine youth work quality systems in EU Member States. The outcome will be a handbook that gives guidance and support on basic quality principles and on the design and implementation of youth quality approach.*

[http://eacea.ec.europa.eu/about-eacea/calls-for-tenders/study-contribution-sport-employability-young-people-in-context-europe-2020-strategy\\_en](http://eacea.ec.europa.eu/about-eacea/calls-for-tenders/study-contribution-sport-employability-young-people-in-context-europe-2020-strategy_en)

Deadline : 12/10/2015

The maximum amount of the contract is € 200 000



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**SPECIFICITIES OF THE PROGRAMME**

- ❖ Each organisation involved in the application must register in the Participant Portal and receive a Participant Identification Code (PIC).
- ❖ The applicant needs to prove their financial capacity for grants exceeding 60 000 EUR – document to be uploaded on the participant portal.
- ❖ Through the selection criteria, the National or Executive Agency assesses the applicant's financial and operational capacity to complete the proposed project.
- ❖ The applicant has the necessary professional competencies and qualifications to carry out the proposed project
- ❖ The electronic form must be completed in one of the official languages spoken in Programme Countries (or one of the EU official languages. )



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**→ LINKS**

1. [http://eacea.ec.europa.eu/erasmus-plus/actions\\_en](http://eacea.ec.europa.eu/erasmus-plus/actions_en)
2. [http://ec.europa.eu/programmes/erasmus-plus/discover/guide/index\\_en.htm](http://ec.europa.eu/programmes/erasmus-plus/discover/guide/index_en.htm)
3. <http://ted.europa.eu/TED/main/HomePage.do>
4. [http://ec.europa.eu/education/tools/national\\_agencies\\_en.htm](http://ec.europa.eu/education/tools/national_agencies_en.htm)

**→CONTACTS**

Georges BINGEN – Head of Unit  
Unit A.6 - Erasmus + : Sport, Youth and EU Aid Volunteers (EACEA)  
Tel: +32 229-54866

**Erasmus Plus National Agency - France**  
Bordeaux Agency for Education strand : 05 56 00 94 00  
INJEP for the Youth strand: : 01 70 98 93 70

**Erasmus Plus National Agency - Bulgaria:**  
Human Resource Development Centre (HRDC): 00359 2 91 550 10



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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**PERTINENT PROGRAMMES FOR EQUALITY BODIES**

| Intra-community programmes                 | Other programmes                                   |
|--|--|
| Rights, equality and citizenship programme | European instrument for Democracy and Human Rights |
| EaSI – PROGRESS                            | Human Rights, Education and Youth Programme        |
| ERASMUS +                                  | Structural funds – ex France, Bulgaria             |




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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**EUROPEAN INSTRUMENT FOR DEMOCRACY AND HUMAN RIGHTS**

**Objective:**

➔ To strengthen international and regional frameworks for the promotion and protection of human rights, justice, the rule of law and democracy in accordance with Union policy priorities

**Priorities:**

- Support to human rights and human rights defenders in situations where they are most at risk
- Support to other priorities of the Union in the field of human rights
- Support to democracy
- Support to targeted key actors and processes, including international and regional human rights instruments and mechanisms
- Promotion and protection of human rights and fundamental freedoms = support for, protection of, and assistance to human rights defenders




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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

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**EUROPEAN INSTRUMENT FOR DEMOCRACY AND HUMAN RIGHTS**

Among financed actions:

- Support to:
  - local civil society's contribution to EU human rights dialogues
  - the development and implementation of international and regional human rights
  - international criminal justice instruments and mechanisms, including the International Criminal Court



Amount and co-financing rate of the total eligible costs depend on the calls




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

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**EUROPEAN INSTRUMENT FOR DEMOCRACY AND HUMAN RIGHTS**



Application forms :

- ➔ submission in electronic format (CD-ROM) and in a separate and single file, send by post

Annexes :

- Part A: concept note
- Part B: full application form),
- Part C: budget and logical framework

➔ LINKS

1. <https://ec.europa.eu/europeaid/funding>
2. [https://ec.europa.eu/europeaid/funding/funding-instruments-programming/annual-work-programmes\\_en](https://ec.europa.eu/europeaid/funding/funding-instruments-programming/annual-work-programmes_en)

➔ CONTACTS

EC delegations - [http://www.eeas.europa.eu/delegations/index\\_en.htm](http://www.eeas.europa.eu/delegations/index_en.htm)



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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

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**PERTINENT PROGRAMMES FOR EQUALITY BODIES**

| Intra-community programmes                 | Other programmes                                   |
|--|--|
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| EaSI – PROGRESS                            |  |
| ERASMUS +                                  | Human Rights, Education and Youth Programme        |
|  | Structural funds – ex France, Bulgaria             |



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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

### PERTINENT PROGRAMMES FOR EQUALITY BODIES

| Intra-community programmes                 | Other programmes                                   |
|--|--|
| Rights, equality and citizenship programme | European instrument for Democracy and Human Rights |
| EaSI – PROGRESS                            | <b>Human Rights, Education and Youth Programme</b> |
| ERASMUS +                                  | Structural funds – ex France, Bulgaria             |
| CONSUMER PROGRAMME                         |  |




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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

### HUMAN RIGHTS, EDUCATION AND YOUTH PROGRAMME



**GLOBAL OBJECTIVE:**

- Human rights and democracy: youth policy and youth work promoting the core values of the Council
- Youth policy and youth work promoting intercultural dialogue “Living together in diverse societies“
- Social inclusion of young people
- Policy approaches and instruments benefiting young people and children




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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

### HUMAN RIGHTS, EDUCATION AND YOUTH PROGRAMME



**PRIORITIES :**

- **Good governance**  
*Developing youth policies based on the Council of Europe standards, with a view to supporting young people’s access to rights*
- **Promoting democratic competences**  
*Increasing youth’s competences in human rights education and education for democratic citizenship to act as multipliers in member states*
- **Building capacities for dialogue**  
*Preparing the youth to contribute in peace building, conflict transformation and intercultural dialogue with neighbouring regions Member states and non-governmental partners*




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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**HUMAN RIGHTS, EDUCATION AND YOUTH PROGRAMME**



**PRIORITIES :**

- **Strengthening participation**  
Quality education in Cultural Convention States are developed (formal and non-formal settings)  
Education and youth group work for Roma, migrants and other vulnerable groups
- **Strengthening social cohesion**  
Education and training for young people's autonomy and better transition from education to working life/labour market  
Improving access to human rights by developing youth policy responses to exclusion, discrimination and xenophobia, in particular in disadvantaged areas and for vulnerable groups




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**HUMAN RIGHTS, EDUCATION AND YOUTH PROGRAMME**



**Financed actions**

- Pilot projects run by NGOs and youth local groups to undertake actions related to human rights education with young people
- National and regional training courses in human rights education

**Application procedures :**  
Different procedure : on-line subscription to be a partner in the programme and participate in the different actions implemented by the programme.  
<http://www.coe.int/t/dq4/youth/>




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**HUMAN RIGHTS, EDUCATION AND YOUTH PROGRAMME**



**Eligible countries :**  
European Union, Candidate countries, European Economic Area, Switzerland.

**Eligibility criteria:**

1. Be directly related to young people and to human rights education
2. Local association, institution or youth group acting directly with children, young people or a specific target group
3. The project must have an innovative character, be open to other partners of the Youth Programme on Human Rights Education




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

→ **LINKS**

- [https://www.coe.int/t/dg4/youth/coe\\_youth/coe\\_and\\_young\\_people\\_EN.asp?](https://www.coe.int/t/dg4/youth/coe_youth/coe_and_young_people_EN.asp?)
- <http://www.coe.int/t/dg4/youth/>

→ **CONTACTS**

**Z. MOLNAR** - Directorate of Youth and Sport  
 Zivatar utca 1-3  
 H-1024 Budapest  
 Hungary  
 zsuzsanna.molnar@coe.int  
 +36 1 438 1060




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IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

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| Intra-community programmes                 | Other programmes                                   |
|--|--|
| Rights, equality and citizenship programme | European instrument for Democracy and Human Rights |
| EaSI – PROGRESS                            | Civil society organisation and local Authorities   |
| ERASMUS +                                  | Human Rights, Education and Youth Programme        |
| CONSUMER PROGRAMME                         | Structural funds – ex France, Bulgaria             |




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**SESSION 2: INTRODUCTION TO STRUCTURAL FUNDS**




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES



**Structural funds**

**Managing Authority :**  
Depending on the Member state organisation. It can be managed either by national authorities or regional/local authorities

**It consists of 2 funds :**

1. ERDF (Equipment)
2. ESF (Human resources)

**Global objective :**  
Regional Policy targets all regions and cities in the European Union in order to support job creation, business competitiveness, economic growth, sustainable development, and improve citizens' quality of life..


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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES


**ESF in FRANCE**

**Allocated budget (2.893 billion €):**  
65 % of ESF budget is managed on national ground



**National priorities 2014-2020:**

- Assisting unemployed and inactive persons, including young people in unemployment and those young people who are most disconnected from the labour - **454 million € allocated budget**
- Securing career pathways by means of forward planning of jobs and skills, training for low-skilled workers, women and older people, training for workers made redundant, and encouraging businesses to commit to equal pay and opportunities - **707 million € allocated budget**
- Reducing poverty, helping vulnerable people and promoting inclusion - **1.634 million €**




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**ESF in FRANCE**

**Allocated budget (2.893 billion €):**  
35% of ESF budget is managed by the regional authorities



**Regional priorities 2014-2020:**

- Giving access and providing "training" to people in need
- Investing in lifelong skills, education, and training at the regional ground

**Organisation of the programme:**  
The priorities and actions to be implemented are written in an operational programme and validated by the European Commission.  
Both national and regional ESF operate through **call for proposals**. However in some region, the managing authority will allow on-going submission.  
On-line submission through official participant portal




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**ESF in BULGARIA**

**Managing Authority :**

Administration of the Council of Ministers.  
 Ministry of Labour and Social Policy  
 Ministry of Science and Education - General Directorat  
 Structural Funds and International Educational Programmes



**3 operational programmes of ESF :**

**The Operational programme « Good Governance » :**

- **Modernising Public Administration** : to reduce administrative and regulatory burden on citizens and business - 118 million €
- **Improving the quality, independence and efficiency of the judiciary** : to increase transparency and accelerate judicial proceedings through structural, procedural and organisational reforms in the judiciary – 30 million €




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**The Operational programme “Human Resources Development”:**



- Employment will be boosted by projects targeting better access to jobs and helping long-term unemployed and young people, particularly those not in employment, education or training up
- Social inclusion measures. These will target groups such as the young and older members of society, those with disabilities, and minorities such as Roma. Social entrepreneurship and access to vocational training will be promoted, as will better access to health and social care services - 286 million €
- Improvements to public services that deal with employment and social or health-related matters. Funding for transnational exchanges of good practice will help to achieve this.




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**The Operational Programme “Science and Education for Smart Growth” :**



- **Strengthening research and innovation** : developing centres of excellence and centres of competence, as hubs of high-quality research and innovation in the areas defined in the Research and Innovation Strategy for Smart Specialisation – 243 million €
- **Enhancing education and social inclusion at all educational levels:**
  - improving key competences of students and children, including through innovative teaching methods. It will promote the quality of higher education with a view of obtaining better outcomes on the labour market, as well as the modernisation of vocational education and life-long learning - 220 million €
  - integration of children at risk of exclusion from education, on account of belonging to marginalised ethnic groups or to groups with specific educational needs - 110 million €




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES



ИНФОРМАЦИОННА СИСТЕМА  
ЗА УПРАВЛЕНИЕ И НАДГЛЕДАНЕ  
НА СРЕДСТВАТА ОТ ЕС В  
БЪЛГАРИЯ 2014 - 2020



ЕДНА ПОСОКА  
МНОГО ВЪЗМОЖНОСТИ  
2014 - 2020

**Organisation of the programme:**

1. The priorities and actions to be implemented are written in an operational programme and validated by the European Commission.
2. The Managing authorities operate through call for proposals. However there are also possibilities to receive direct awards.
3. On-line submission through official participants portal - <https://eumis2020.government.bg/>




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SESSION 1 : IDENTIFICATION OF INTRA-COMMUNITY PROGRAMMES FOR EQUALITY BODIES

**→ LINKS**

1. <http://www.eufunds.bg/>
2. <http://www.eufunds.bg/bg/page/58?status=1&programme>
3. <http://www.ophrd.government.bg>
4. <https://eumis2020.government.bg/bg/a6167455>

**→CONTACTS**

Siana Stoyanova - HEAD OF HRD Operational programme Authority  
[s.stoyanova@mlsp.government.bg](mailto:s.stoyanova@mlsp.government.bg)




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SESSION 3 : PARTNERSHIP AND APPLICATION METHODOLOGY




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### The principles of partnership in European projects

- **Partner organisations**, from different States and different working areas
- **Common objectives** materialised by concrete projects
- **No ad hoc legal status** required for the consortium
- Gather the necessary **competences and expertise** for the project's success
- Coordination by a **unique project leader**
- **Multicultural environment**, sometimes unbalanced for economic and social reasons




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### Identifying relevant partners for one's project




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### Identifying relevant partners for one's project

#### EUROPEAN COMMISSION'S TOOLS

- **Compendia of European programmes**: list of selected projects under calls for proposals
- **Success stories or brochures « Successful projects »** : presentation of the best projects financed
- **Partner search data base**: partner data base available for most important programmes. They allow to publish announcements and to consult tenders or request of partnership
- **INFODAYS**: information days on calls




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### Identifying relevant partners for one's project

#### EU OFFICES IN MEMBER STATES

- **National agencies:** management of some of the calls for proposals  
→ Erasmus +
- **National contact points:** information on the funding programme
- **Enterprise Europe Network:** information, advice and assistance for companies on European questions




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### Identifying relevant partners for one's project

#### EUROPEAN NETWORKS

- **European associations** representing the interest of a discipline, a sector, a branch or a cause and working / coordinating organizations in this field

How to identify them?

- In the **Transparency Register of the European Commission**, which provides free access to the civil society index at European level

[http://europa.eu/transparency-register/index\\_fr.htm](http://europa.eu/transparency-register/index_fr.htm)

- Compendia of operating grants
- Online ...




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### Identifying relevant partners for one's project

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- Step 1:** Define the ideal partner with the « project sheet »
  - Step 2:** Search and identify potential partners
  - Step 3:** Send them your "project sheet", your "partner profile" and explain the coordinator's and partners' roles
  - Step 4:** Select motivated partners only!
  - Step 5:** Formalise your partnership




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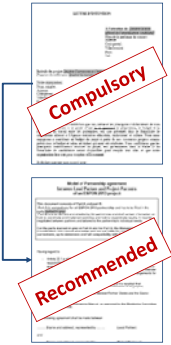
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PARTNERSHIP AND APPLICATION METHODOLOGY

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### Formalizing the partnership

1. Before the call for proposals :  
make each partner sign a letter of intent
2. Before the project starts :  
conclude a partnership agreement






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PARTNERSHIP AND APPLICATION METHODOLOGY

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### Formalizing the partnership

**Advice :**

- Sign a Memorandum of Understanding (MoU) to prepare the Partnership Agreement
- Draw up the Partnership Agreement after receiving notification of the project selection, and sign it before the project starts
- Call upon legal skills within your organisation
- Proceed to a balanced allocation of tasks
- Arrange a sharing of risks and opt for democratic decision-making rules
- Insist on an active participation of all partners





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PARTNERSHIP AND APPLICATION METHODOLOGY

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### ESSENTIAL ELEMENTS :

|   |  |
|---|--|
| ▪ Project objectives                          | ▪ Communication and publicity                    |
| ▪ Duration of the project                     | ▪ <u>Intellectual property rights</u>            |
| ▪ Roles, rights and duties                    | ▪ Confidentiality requirements                   |
| ▪ Work plan                                   | ▪ Cooperation with third parties                 |
| ▪ Organisational structure of the partnership | ▪ <u>Modifications, withdrawals and disputes</u> |
| ▪ Working language                            | ▪ Force majeure                                  |
| ▪ Budget and financial clauses                |  |
| ▪ Monitoring, evaluation and reporting        |  |
| ▪ Control, accountancy, audit                 |  |




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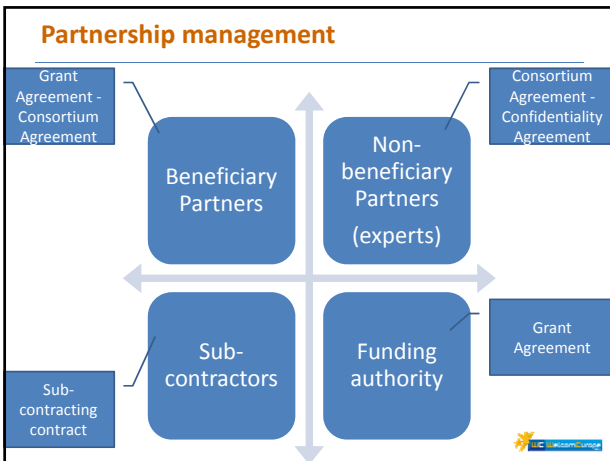
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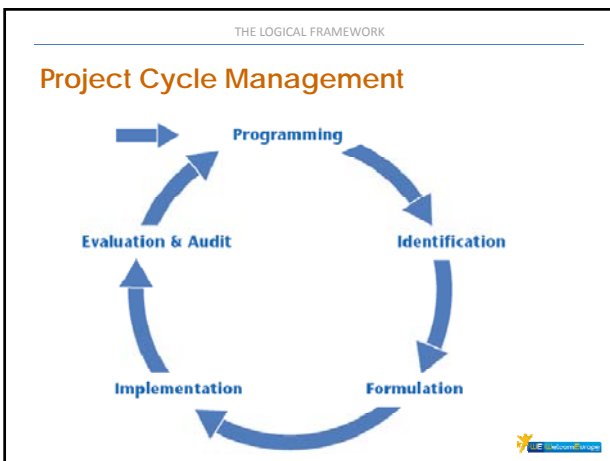
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THE LOGICAL FRAMEWORK

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**PLANNING PHASE**

- ↓ **Developing Logical Framework matrix** - defining project structure, testing its internal logic & risks, formulating measurable indicators of success ★ 5. Logical Framework Matrix
- ↓ **Activity scheduling** - determining the sequence and dependency of activities; estimating their duration, and assigning responsibility ★ 6. Action Plan (Gantt Diagram)
- ↓ **Resource scheduling** - from the activity schedule, developing input schedules and a budget ★ 7. Provisional Budget



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THE LOGICAL FRAMEWORK

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**ANALYSIS PHASE**

- ↓ **Stakeholder analysis** - identifying & characterising potential major stakeholders; assessing their capacity ★ 1. Stakeholder Matrix
- ↓ **Problem analysis** - identifying key problems, constraints & opportunities; determining cause & effect relationships
- ↓ **Objective analysis** - developing solutions from the identified problems; identifying means to end relationships
- ↓ **Strategy analysis** - identifying different strategies to achieve solutions; selecting most appropriate strategy.



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| Stakeholder and basic characteristics  | Interests and how affected by the problem(s)  | Capacity and motivation to bring about change  | Possible actions to address stakeholder interests  |
|--|---|--|--|
| <b>Fishing families:</b><br>c.20,000 families, low income earners, small scale family businesses, organised into informal cooperatives, women actively involved in fish processing and marketing | <ul style="list-style-type: none"> <li>• Maintain and improve their means of livelihood</li> <li>• Pollution is affecting volume and quality of catch</li> <li>• Family health is suffering, particularly children and mothers</li> </ul> | <ul style="list-style-type: none"> <li>• Keen interest in pollution control measures</li> <li>• Limited political influence given weak organizational structure</li> </ul>   | <ul style="list-style-type: none"> <li>• Support capacity to organize and lobby</li> <li>• Implement industry pollution control measures</li> <li>• Identify/develop alternative income sources for women and men</li> </ul>               |
| <b>Industry X:</b><br>Large scale industrial operation, poorly regulated and no-unions, influential lobby group, poor environmental record   | <ul style="list-style-type: none"> <li>• Maintain/increase profits</li> <li>• Some concern about public image</li> <li>• Concern about costs if environmental regulations enforced</li> </ul>   | <ul style="list-style-type: none"> <li>• Have financial and technical resources to employ new cleaner technologies</li> <li>• Limited current motivation to change</li> </ul>  | <ul style="list-style-type: none"> <li>• Raise their awareness of social and environmental impact</li> <li>• Mobilise political pressure to influence industry behaviour</li> <li>• Strengthen and enforce environmental laws</li> </ul>   |
| <b>Households:</b><br>c.150,000 households discharge waste and waste water into river, also source some drinking water and eat fish from the river   | <ul style="list-style-type: none"> <li>• Aware of industrial pollution and impact on water quality</li> <li>• Want to dispose of own waste away from the household</li> <li>• Want access to clean water</li> </ul>                       | <ul style="list-style-type: none"> <li>• Limited understanding of the health impact of their own waste/ waste water disposal</li> <li>• Potential to lobby government bodies more effectively</li> <li>• Appear willing to pay for improved waste management services</li> </ul> | <ul style="list-style-type: none"> <li>• Raise awareness of households as to implications of their own waste disposal practices</li> <li>• Work with communities and local government on addressing water and sanitation issues</li> </ul> |
| <b>Environmental protection agency:</b><br>Etc   | etc   | etc  | etc  |

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THE LOGICAL FRAMEWORK

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**ANALYSIS PHASE**

- ▼ **Stakeholder analysis** - identifying & characterising potential major stakeholders; assessing their capacity
 ★ 1. Stakeholder Board
- ▼ **Problem analysis** - identifying key problems, constraints & opportunities; determining cause & effect relationships
 ★ 2. Problem tree
- ▼ **Objective analysis** - developing solutions from the identified problems; identifying means to end relationships
- ▼ **Strategy analysis** - identifying different strategies to achieve solutions; selecting most appropriate strategy.

E U R O P E A N U N I O N

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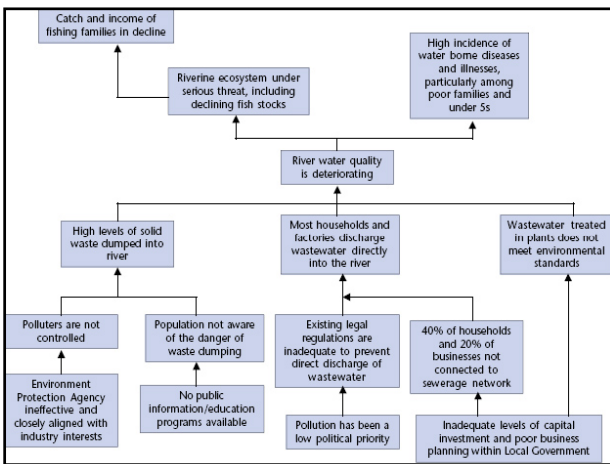
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THE LOGICAL FRAMEWORK

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**Exercise: Elaboration of a problem tree**

➔ *Based on a given problematic, please identify all the problems, causes and consequences. Organise the identified elements as explained...*

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THE LOGICAL FRAMEWORK

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**ANALYSIS PHASE**

- ▼ **Stakeholder analysis** - identifying & characterising potential major stakeholders; assessing their capacity
 ★ 1. Stakeholder Board
- ▼ **Problem analysis** - identifying key problems, constraints & opportunities; determining cause & effect relationships
 ★ 2. Problem tree
- ▼ **Objective analysis** - developing solutions from the identified problems; identifying means to end relationships
 ★ 3. Objective tree
- ▼ **Strategy analysis** - identifying different strategies to achieve solutions; selecting most appropriate strategy.

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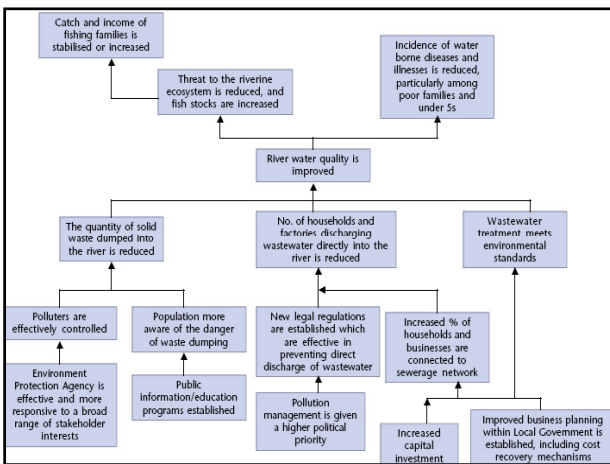
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THE LOGICAL FRAMEWORK

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**Exercise: Elaboration of an objective tree**

1. Referring to the instruction and based on your problem tree, please define your objective tree and distinguish between your overall objective, specific objective and the results
2. Define the related activities and the means/costs needed.

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THE LOGICAL FRAMEWORK

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**FIELDS TO BE FILLED IN:**

**Step 1: Intervention Logic:** overall objective(s), specific objective/purpose, results, activities, resources and costs

**Step 2:** Assumptions, external conditions, pre-conditions

**Step3:** Objectively verifiable indicators of achievement and Sources of Verification

**Step 4:** Means and Costs




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THE LOGICAL FRAMEWORK


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**Step 1: INTERVENTION LOGIC**

**Overall objective:** the broad development impact to which the project contributes at a national or field level

**Specific objective:** Activities to be implemented – more specifically the expected benefits to the target group(s)

**Results:** the direct/tangible results (good and services) that the project delivers, and which are under project management’s control




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THE LOGICAL FRAMEWORK

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**Step 2: THE ASSUMPTIONS**

→ External factors that have the potential to influence the success of a project

“What external factors may impact on project implementation and the long-term sustainability of benefits, but are outside project management’s control?”

**BEFORE INCLUDING THE ASSUMPTIONS IN THE LOGFRAME, ask yourself the following questions :**

1. Are they really outside Project’s team control?
2. Are they sure, likely, unlikely to occur?
3. At which level of the logframe do I put them?




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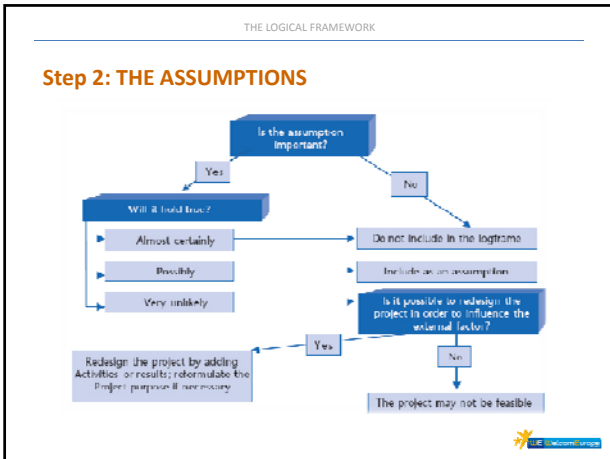
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THE LOGICAL FRAMEWORK

### Step 3: THE OBJECTIVELY VERIFIABLE INDICATORS

- OVI : describe the project's objectives in operationally measurable terms (quantity, quality, time – or QQT)
- check the feasibility of objectives
- basis of the project's monitoring and evaluation system
- A good OVI should also be SMART

#### SOURCES OF VERIFICATION

- SoV: reliable source to test whether or not the Indicators can be measured at the expense of a reasonable amount of time, money and effort.
- Specify: how-who-when

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THE LOGICAL FRAMEWORK

### Step 4: MEANS AND COSTS

- List the means/resources to be used by the project for implementing the activities
- List globally the corresponding costs
- Not an in-depth financial presentation

| Activities  | Means/Resources   | Costs/Budget  |
|---|---|---------------|
| Activity 1.1 Conduct baseline survey of households and businesses pollution   | <b>personnel</b><br>1 manager Istanbul<br>2 researchers                   | 10800<br>3600 |
| Activity 1.2 Identify appropriate incentives for factories to use clean technologies  | <b>Travel</b><br>Missions Brussels-Istanbul<br>Missions Istanbul-Brussels | 1000<br>2000  |
| Activity 1.3 Complete engineering specifications for expanded sewerage network  | <b>equipment and supplies</b><br>car purchase                             | 6000          |
| Activity 1.4 -Building of the infrastructure of the sewerage network partially subcontracted and made in cooperation with municipalities services | <b>studies</b>  | 30000         |
| Others Activities   | <b>conferences</b>  | 30000         |
|   | <b>TOTAL</b>  | 30000         |

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SESSION 5 : BUDGETING RULES



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BUDGETING RULES

### Mastering budget principles and rules

- Legal sources: Financial Regulation (title VI) and its implementing rules (available on the DG Budget website)

[http://ec.europa.eu/budget/biblio/documents/regulations/regulations\\_en.cfm](http://ec.europa.eu/budget/biblio/documents/regulations/regulations_en.cfm)



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BUDGETING RULES

### Rules and principles

- Consistent
- Balanced
- In line with financial conditions, rate of co-financing, matching funds, allowable costs, etc.
- Analytical approach: dissociate project budget from organization budget



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BUDGETING RULES

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### Rules and principles

- Collect all information and documents available (as indicated in the call)
- Understand the difference between eligible and non-eligible costs
- Strictly follow the structure of the budget form
- Establish coherent calculation modes (record them for potential checks)




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BUDGETING RULES

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### SPECIFIC RULES AND PRINCIPLES

**Right and citizenship programme –**

**VAT inquiry :** *If the applicant or one of the partners is a public entity, it should be identify in the sheet Forecast Budget as VAT is not eligible for public authorities.*

**Subcontracting :** *the tasks that will be subcontracted need to be clearly identified and duly explained- reasons for the lack of the relevant expertise within the Partnership.*

*The estimated costs of the subcontracting are clearly identifiable in the estimated budget.*




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BUDGETING RULES

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### SPECIFIC RULES AND PRINCIPLES

**ERASMUS + programme –**

**Budgeting:** *This programme combines unit cost and real costs on the budget chapters.*

*For example: Unit cost for a teacher/trainer/ technician + Staff cost < 40% of the total budget*

*Idem for mobility cost - For travel distances between 100 and 499 KM: 180 EUR per participant*




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**SPECIFIC RULES AND PRINCIPLES****Structural funds –**

**Depending on the countries, the rules are not the same.**

*For example, in France, contribution in kind is eligible on the ESF. However, the applicant need to bring forward proven documents.*

*For project under 50 000 €, the application of flat rate calculation is compulsory.*

**EIDRH -**

**Application of contingency reserve – flat rate of 5% of the total budget.**




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**DIRECT COSTS :**

- All costs directly linked to the completion of the action:
- Staff costs (expat/local staff salaries, per diems (abroad,local, events participants)
- Travel (international, local)
- Equipment and supplies
- Local office (vehicle, consumables - office supplies, office rent, tel/fax, electricity/heating, maintenance)




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**DIRECT COSTS :**

- Other costs, services (Publications, Studies, research, Auditing costs, Evaluation costs, Translation, interpreters, Financial services: bank guarantee costs, etc., Costs of conferences/seminars, Visibility actions)

**INDIRECT COSTS :**

- Overhead/Administrative costs
- Participation to overhead costs is limited to 7% of the eligible direct costs
- Watch! No justification to be provided




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BUDGETING RULES

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**NON ELIGIBLE COSTS :**

- costs incurred outside the contracting period
- debts and provisions for losses or debts
- interest owed
- items already financed in another framework
- purchases of land or buildings, except where necessary for the direct implementation of the action
- currency exchange losses
- taxes, including VAT
- credits to third parties




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BUDGETING RULES

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**Choosing the right unit/calculation modes :**

- Staff costs / human resources
- Unit cost/month
- Number of months assigned to the operation of the project
- Travel allowances
- Estimated cost based on the quote (real cost)
- Real costs or PER DIEM
- Equipment
- The least expensive solution between new, second-hand or renting during the agreed period




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BUDGETING RULES

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**The European Commission would like to see some expenses lightened:**

- Translation costs... especially inside the network
- Travel and subsistence allowances... especially by using new information and communication technologies ICT (virtual workplace, infomail...)
- Staff costs exploited too much... especially in the number of staff already working for the applicant organisation and assigned to the operation of the project
- Sub-contracting costs...




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### BUDGETING

**CASE STUDY :** Dr. X is the director of the "institute for Human Rights" (IRH), University of Essex. He has been contacted by Nova, an Equal treatment authority to be part of a European project. Dr X has to submit his budget proposal to the coordinator, regarding his involvement as well as the involvement of his agents in the project. The project duration is of 48 months. Please complete the budget sheet given in the handbook.

**Objectives of the case study :**

- Acquire the methodology for building a budget
- Understand eligibility rules
- Improve knowledge on expenses categories (i.e. calculate personnel costs)




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**SESSION 6 : THE EVALUATION AND COMMUNICATION STRATEGY**




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### The evaluation plan



#### Evaluating, what for ?

- Analyse the past to plan the future
- Evaluation plan requested at the submission stage
- Comparison Expected results / Achieved results
- Analysis of the project's impact
- Critical assessment: identification of strengths and weaknesses
- Recommendations : consolidate the achievements or consider reorientations




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### Capitalisation

#### Definition

- Capitalising is giving value and promoting knowledge
- Capitalising is theorizing know-how to avoid losses, which supposes a codification and harmonization so as to allow a re-use for oneself or for somebody else
- Capitalising is transforming tacit knowledge into explicit knowledge (giving experience a chance to become a scientific knowledge)




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### The publicity obligation

- One of the EC's missions is to communication about EU policies and funded projects
- Application forms require a communication plan
- The visibility clause is mentioned in the Grant Agreement
- Any communication or publication by the beneficiaries shall indicate that the action has received funding from the Community




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### Developing a Communication plan

- A sum of actions do not constitute a strategy/a communication plan
- 2 types of communication : **internal & external**
- Build one's strategy by addressing the following questions :
  - What are the **objectives** ?
  - What are the **target groups** ?
  - With which **communication supports** ?




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THE EVALUATION AND COMMUNICATION STRATEGY

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**Why disseminate and for whom ?**

- To broadcast the project results
- To make staff and target groups aware of what a good job they have done
- To strengthen the notoriety of one's organization and of the whole consortium


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THE EVALUATION AND COMMUNICATION STRATEGY

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**Why disseminate and for whom ?**

- To make all interested parties and a wider public aware of what you have accomplished
- To generate general interest in transnational cooperation
- To raise awareness of European cultural diversity and European citizenship
- To influence decision-makers and ease their decision thanks to the formulation of recommendations
- Raise future funding authorities' awareness in order to ensure the **continuity** and **sustainability** of the project




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THE EVALUATION AND COMMUNICATION STRATEGY

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**What to disseminate ?**

- Products
- Methods
- Experiences
- Good practices
- Recommendations
- Guides




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THE EVALUATION AND COMMUNICATION STRATEGY

**1**  
Internal




**Target groups**

- Project members
- Tasks leaders

**Supports**

- Newsletter
- On-line collaborative space
- Workshops, seminars
- Twitter
- Facebook




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THE EVALUATION AND COMMUNICATION STRATEGY

**2**  
External




**Target groups**

- Community
- Policy-makers
- General public

**Supports**

- Conferences, seminars
- General public events
- Policy brief
- Graphic charter
- Publications
- Website, video




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THE EVALUATION AND COMMUNICATION STRATEGY

**Specificities : structural funds**

- Grants > 500 000€
  - Obligation to use visible signs of significant size
- Grants > 1 m€
  - Obligation to hold a public event (European representatives, media, general public)






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THE EVALUATION AND COMMUNICATION STRATEGY

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**Some advices ...**

- Communication : task assigned to the project leader
  - Nevertheless, a partner can perform one task (e.g.: website)
  - All partners contribute to the communication on the project
- Website: public part + private part (exchange of information between the consortium members)
- Provide photographs and/or illustrations of your project featuring your dissemination actions and materials
- Collect press articles mentioning your project

 For some programmes :  
**Any failure to comply with the dissemination obligation shall lead to the reimbursement or deduction of the grant !**



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**SESSION 7: THE REPORTING OF THE PROJECT**



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THE REPORTING OF THE PROJECT

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- The EC establishes the deadlines for delivery of requested reports in the Grant Agreement
- Example :

Period 1

Period 2

Period 3

M0 > M18

M18 > M36

M36 > M48

M20 : Report 1

M40 : Report 2

M50 : Final report

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THE REPORTING OF THE PROJECT

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**2 types of report**

1. **Activities / Technical report** : description of completed activities , state of progress of the project
2. **Financial report**: details of the costs incurred

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**THE TECHNICAL REPORT**




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THE REPORTING OF THE PROJECT

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**The technical report (Interim – periodic)**

- Description : completed activities, achieved results and produced deliverables during the period covered
- Changes compared to original working plan
- Partnership management
- Problems experienced and solved
- Indicators monitoring
- Work plan for the next phase of the project




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The reporting of the project

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### The technical report - Final

- Description : activities, final results, deliverables
- Partnership management
- Project impact
- Synergies between partners / new partners : past, on-going, future
- Sustainability of the project
- Indicators monitoring
- Public summary




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THE REPORTING OF THE PROJECT

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### The technical report - Advice

- Explain, the objectives, completed tasks and achieved results
- Work from the project's summary in the application form
- Document aimed at promoting the project : first information - > must draw the attention
- Organize your ideas
- If the English language is requested : proofreading by an English-speaking person
- Available to a large public -> appropriate vocabulary but without excluding technical terms




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THE REPORTING OF THE PROJECT

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### The technical report - Examples of report architecture

| Example 1                                       | Example 2                   |
|---|-----------------------------|
| 1 Progress of Task 1: ...Task 2: ...Task 3: ... | 1 Objectives                |
| 2 Significant results                           | 2 Activities                |
| 3 Deviations from technical annex               | 3 Difficulties / solutions  |
| 4 Reasons for failing to achieve objectives     | 4 Significant facts/results |
| 5 Justification of resources                    | 5 Consortium                |
| 6 Corrective actions                            | 6 Meetings                  |
|   | 7 Open comments             |




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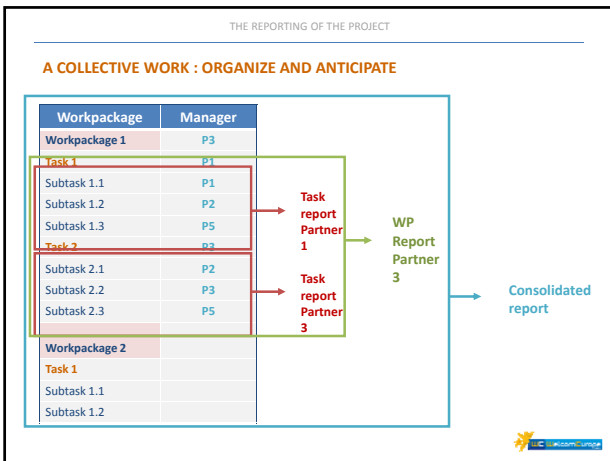
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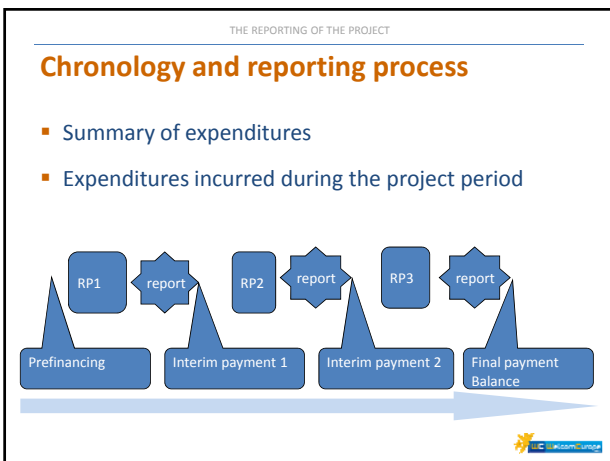
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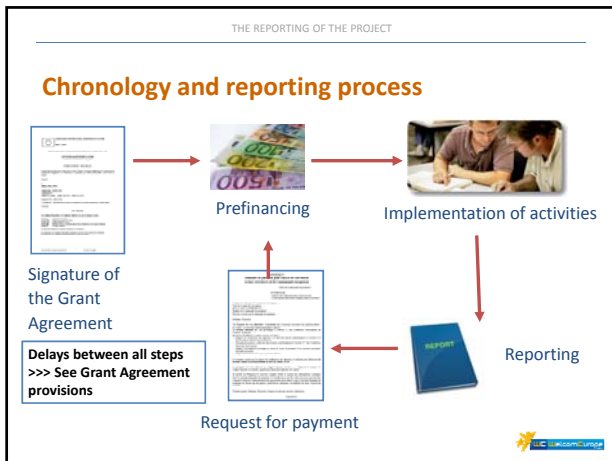
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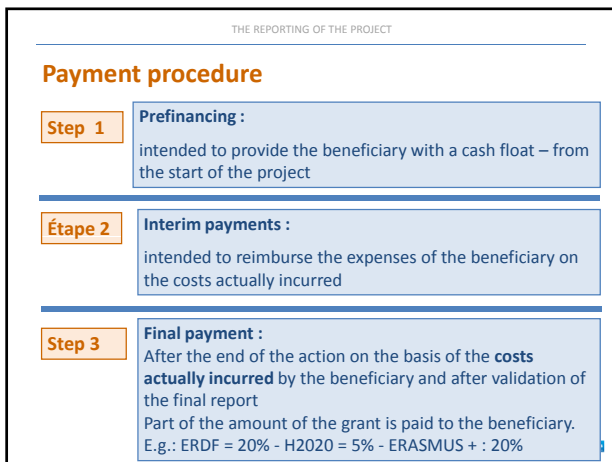
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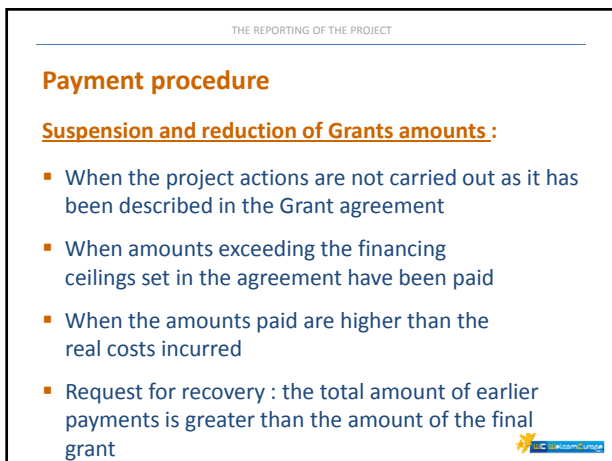
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| COMPTES DE SOCIÉTÉ GÉNÉRALE |                            |          |          |
|-----------------------------|----------------------------|----------|----------|
| Date                        | Libération                 | Debit    | Credit   |
| 1/1/10                      | Solde à recevoir           | 1572,00  |          |
| 3/1/10                      | Reçu de chèques            | 3234,00  |          |
| 2/1/10                      | Paiement Mollat chèque 710 |          | 2010,00  |
| 2/1/10                      | Paiement Mollat 710        |          | 2500,00  |
| 7/1/10                      | Paiement Dunlop chèque 760 |          | 4710,00  |
| 8/1/10                      | Paiement Aghin chèque 760  |          | 3500,00  |
| 8/1/10                      | Versement espèces          | 2500,00  |          |
| 8/1/10                      | Paiement Aghin chèque 760  |          | 1710,00  |
| 16/1/10                     | Paiement Mollat chèque 712 |          | 854,00   |
| 16/1/10                     | Reçu chèques               |          | 1710,00  |
| 16/1/10                     | Paiement chèques           | 3300,00  |          |
| 20/1/10                     | Démobilisation autobus     |          | 7474,00  |
| 20/1/10                     | Paiement Aghin chèque 760  | 10000,00 |          |
| 20/1/10                     | Paiement Aghin chèque 760  |          | 2540,00  |
| 27/1/10                     | Paiement Mollat chèque 714 |          | 1187,00  |
| 31/1/10                     | Solde débiteur             |          | 1642,00  |
|                             | TOTAL                      | 27462,00 | 27462,00 |



**JUSTIFICATION OF COSTS :  
SUPPORTING DOCUMENTS**




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THE REPORTING OF THE PROJECT

**Types of eligible costs**

- Personnel costs
- Mission expenses
- Sub-contracting costs
- Equipment
- Indirect costs




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THE REPORTING OF THE PROJECT

**Personnel costs**

- Eligibility criteria : demonstrate the employability link
- Existence of a an employment contract or appointment decision (public servants)
- Proof of the agent/employee's **assignment** to the project : management's written mandate
- Salary slips
- Proof of salary payment through bank account




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THE REPORTING OF THE PROJECT

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### Personnel costs

- Time sheets
- Agents/employees working on a project must declare their activity
- The time recording system must meet the following minimum requirements:
  - Project acronym
  - Beneficiary Name
  - Identity of the person assigned to the project
  - Number of daily hours worked on the project
  - Description of activities performed
- **Exception** : if the person is working full-time on the project, the project acronym must be written on the employment contract




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THE REPORTING OF THE PROJECT

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| TIME RECORDING FOR A HORIZON 2020 ACTION                      |   | Month:  | Year: |   |   |   |   |   |   |    |    |    |    |    |    |                                  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
|---|---|---|-------|---|---|---|---|---|---|----|----|----|----|----|----|----------------------------------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|-------|--|--|
| Title of the action (acronym):                                |   | Grant Agreement No.:                            |       |   |   |   |   |   |   |    |    |    |    |    |    |                                  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
| Beneficiary's / linked third party's name:                    |   | Type of personnel (see the S&B non-agreements): |       |   |   |   |   |   |   |    |    |    |    |    |    |                                  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
| Name of the person working on the action:                     |   |   |       |   |   |   |   |   |   |    |    |    |    |    |    |                                  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
| DAY   | 1 | 2   | 3     | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16                               | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | Total |  |  |
| Reference   |   |   |       |   |   |   |   |   |   |    |    |    |    |    |    |                                  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
| Short description of the activities carried out in the month: |   |   |       |   |   |   |   |   |   |    |    |    |    |    |    |                                  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
| Signed (name of the person working for the action):           |   |   |       |   |   |   |   |   |   |    |    |    |    |    |    | Signed (name of the supervisor): |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
| Date:   |   |   |       |   |   |   |   |   |   |    |    |    |    |    |    | Date:                            |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |
| Signature:  |   |   |       |   |   |   |   |   |   |    |    |    |    |    |    | Signature:                       |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |       |  |  |

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THE REPORTING OF THE PROJECT

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### Travel costs

**To collect an provide in case of control :**

- Order with the project acronym
- Invoices, transport tickets
- Agenda, invitation, attendance sheet of the meeting/ workshop/conference
- Boarding pass


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THE REPORTING OF THE PROJECT

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**Good financial management practices**

- The coordinator prepares templates of :
  - Time sheets
  - technical reports
  - Cost inventory
  - Sign-off sheets
  - Refund form
  - Minutes of the meeting
- The coordinator delivers them to the partners during the kick-off meeting




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THE REPORTING OF THE PROJECT

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**Good financial management practices**

- The coordinator collects and keeps its originals
- Partners collect and keep their originals and sent to the coordinator certified copies


**Beneficiaries**




**Partners**



**Sub-contractors**






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THE REPORTING OF THE PROJECT

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**Good financial management practices**

The coordinator elaborates and monitors the project's financing plan

| Budget prévisionnel 484,999 EUR/05 |              |             |               |              |              |               |               |              |        |        |       |       |     |
|------------------------------------|--------------|-------------|---------------|--------------|--------------|---------------|---------------|--------------|--------|--------|-------|-------|-----|
| SUBVENTION 248,999 EUR/05 58%      |              |             |               |              |              |               |               |              |        |        |       |       |     |
|                                    | ALERTE       |             |               | ALERTE       |              |               |               |              |        |        |       |       |     |
| Financements pré-moennels          | M1           | coû         | NC            | M1           | coû          | MS            | M1            | coû          | M5     | M1     | coû   | M7    | coû |
| Autofinancement                    | 15000        |             |               |              |              |               |               |              |        |        |       |       |     |
| Financement externe 1              | 30000        |             |               |              |              |               |               |              | 90000  |        |       |       |     |
| Financement externe 2              |              |             |               |              |              |               |               |              |        |        |       |       |     |
| Financement externe 3              |              | 40000       | 75000         |              | 60000        |               | 11000         |              | 145000 |        | 80000 |       |     |
| Financement externe 4              |              |             |               | 10000        |              |               |               |              |        |        |       |       |     |
| Subvention LE                      | 72000        |             |               |              |              | 72000         |               |              |        |        |       | 51000 |     |
| Racettes                           |              |             |               |              |              |               |               |              | 90000  |        |       |       |     |
|                                    | 122000       | 40000       | 0             | 75000        | 10000        | 80000         | 72000         | 11000        | 140000 | 145000 | 0     | 80000 | 0   |
| <b>TRECCORE</b>                    | <b>76000</b> | <b>1000</b> | <b>-40000</b> | <b>17000</b> | <b>17000</b> | <b>-47000</b> | <b>-51000</b> | <b>51000</b> |        |        |       |       |     |
| Coût total projet                  | 475000       |             |               |              |              |               |               |              |        |        |       |       |     |
| Préfinancements versés             | 118000       |             |               |              |              |               |               |              |        |        |       |       |     |
| Racettes autres                    | 240000       |             |               |              |              |               |               |              |        |        |       |       |     |
| Subs. subvention espérée           | 11000        |             |               |              |              |               |               |              |        |        |       |       |     |
| taxe                               | 44,83%       |             |               |              |              |               |               |              |        |        |       |       |     |




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### Good financial management practices

1. Establish a reliable, systematic and open archiving
2. Overspending at the end of the project (risk of costs rejection)
3. Declare amount in the financial reports > to the total amount of the grant




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### Good financial management practices

#### Transfers between headings :

- Authorized provided that this adjustment of expenditure does not affect the implementation of the action
- In some cases : transfer between headings must not exceed 15%/25% of the total eligible costs indicated




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### Risks incurred in the event of mismanagement

- Request for recovery
  - Partial or total repayment of the grant
- Rejection of eligible costs
  - Reduction of the amount of the grant
- Suspension of the project
- Systemic error
  - Extrapolation of the findings of an audit to all funded projects
- Taints the reputation of organizations
- Lengthy, complex and expensive legal proceedings




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Financial management - Exercise

### Good financial management practices

**Exercise : Analyse the financial report below :**

- Detect all the irregularities
- Distinguish major changes (requiring an Amendment) from minor changes



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## QUESTIONS??



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## Thanks for your attention and be successful in your projects !

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## ANNEXES

CASE STUDY - LOGICAL FRAMEWORK

CASE STUDY - BUDGET

CASE STUDY – FINANCIAL REPORTING





**LOGICAL FRAMEWORK FOR THE PROJECT**

|                           | <b>Intervention logic</b>  | <b>Objectively verifiable indicators of achievement</b>   | <b>Sources and means of verification</b>   | <b>Assumptions</b>  |
|---------------------------|--|---|--|---|
| <b>Overall objectives</b> | What are the overall broader objectives to which the action will contribute?   | What are the key indicators related to the overall objectives?  | What are the sources of information for these indicators?  |   |
| <b>Specific objective</b> | What specific objective is the action intended to achieve to contribute to the overall objectives?   | Which indicators clearly show that the objective of the action has been achieved?   | What are the sources of information that exist or can be collected? What are the methods required to get this information?   | Which factors and conditions outside the Beneficiary's responsibility are necessary to achieve that objective? (external conditions) Which risks should be taken into consideration?    |
| <b>Expected results</b>   | The results are the outputs envisaged to achieve the specific objective.<br>What are the expected results? (enumerate them)                      | What are the indicators to measure whether and to what extent the action achieves the expected results?   | What are the sources of information for these indicators?  | What external conditions must be met to obtain the expected results on schedule?  |
| <b>Activities</b>         | What are the key activities to be carried out and in what sequence in order to produce the expected results?<br>(group the activities by result) | <b>Means:</b><br>What are the means required to implement these activities, e. g. personnel, equipment, training, studies, supplies, operational facilities, etc. | What are the sources of information about action progress?<br><b>Costs</b><br>What are the action costs? How are they classified? (breakdown in the Budget for the Action) | What pre-conditions are required before the action starts?<br>What conditions outside the Beneficiary's direct control have to be met for the implementation of the planned activities? |



## Budget case study

Dr. X is the director of the "institute for Human Rights" (IRH), University of Essex. He has been contacted by Nova, an Equal treatment authority to be part of a European project. Dr X has to submit his budget proposal to the coordinator, regarding his involvement as well as the involvement of his agents in the project.

The project duration is of 48 months. Below you will find some information regarding the participation of IHR, in the project. Please complete the budget sheet.

✓ Permanent Personnel:

| name             | Time dedicated to the project (%) | Monthly costs |
|------------------|-----------------------------------|---------------|
| Dr X             | 40%/year                          | 8 013 €       |
| Pierre Dupont    | 10%/year                          | 4 347 €       |
| Julien Desproges | 10%/year                          | 4 417 €       |

✓ Non-permanent personnel (recruited by the project)

| name          | Time dedicated to the project (%) | Monthly costs | Start date - month |
|---------------|-----------------------------------|---------------|--------------------|
| PhD student 1 | 100% (36 months)                  | 2 803 €       | M1                 |
| PhD student 2 | 100% (36 months)                  | 2 803 €       | M24                |
| 1 postdoc     | 100% (24 months)                  | 4 000 €       | M12                |
| 1 engineer    | 100% (12 months)                  | 4 643 €       | M36                |

✓ Other costs:

- **Equipment** (depreciation duration: 5 years):
  - o Computer equipment for a total amount of 16 000 €.
    - 12 000 € for a specific software. It will be used at the beginning of the project by the project team.
    - 4 000 € for PC and laptops for recruited personnel. It will be used at the beginning of the project by the project team.
  - o 1 laser : 200 000 € (purchase costs). It will be used at the beginning of the project and shared by another project team (50%)
- **Consumables** : 10 000/year
- **Missions (travel costs)**: 10 000/ year
- **Publication costs**: 2 000 € (at the last year of the project)
- **Subcontracting**: 500 000€ for evaluation of the overall project

**Methodology - calculation of depreciation costs for equipment:**

Declared cost = (purchase costs / depreciation duration) X duration of use X % of use within the project

## BEFORE STARTING WITH THE APPLICATION

### THE EC FUNDING RULES

#### What are the eligible costs ?

Personnel permanent + additional personnel needed for the project  
 Consumables  
 Equipment (only the part that will be depreciated on the project!)  
 Travels  
 Other direct costs  
 Subcontracting  
 Indirect costs calculated following the method chosen by your organisation for H2020

DIRECT COSTS

INDIRECT COSTS

#### How is the EC funding calculated?

Direct costs & Indirect costs = Eligible costs

The EC is going to fund you on the basis of the Eligible costs up to the MAXIMUM EC funding rate :

100% for research and innovation actions (gravity centre is research) □

70% for innovation actions (gravity centre is closer to the market: demonstrations, pilot, testing, ...)

with the exception of non-profit organisations where the reimbursement rate may reach a maximum of 100%

## INDICATE THE METHOD FOR CALCULATING YOUR INDIRECT COSTS BELOW

|                |                         |
|----------------|-------------------------|
| Indirect cost  | Provide your rate below |
| 25% flate rate | 25%                     |

### BUDGET TOOL

|                           |  |
|---------------------------|--|
| Project Duration (months) |  |
|---------------------------|--|

#### Personnel

| Name<br><i>(optional)</i> | Monthly Wage<br><i>(including charges)</i> | Duration<br>(months) | % time spent on the<br>RTD part<br>during the project | person-<br>month | Eligible<br>wage |
|---------------------------|--|----------------------|---|------------------|------------------|
|                           |  |                      |   |                  |                  |
|                           |  |                      |   |                  |                  |
|                           |  |                      |   |                  |                  |
|                           |  |                      |   |                  |                  |
| <b>Sub-total 1</b>        |  |                      |   | <b>0</b>         | <b>0</b>         |

|                       |          |          |
|-----------------------|----------|----------|
| <b>Sub totals 1+2</b> | <b>0</b> | <b>0</b> |
|-----------------------|----------|----------|

#### Equipment bought for the project

| Description        | Month of acquisition<br><i>(beginning project: "0")</i> | Cost | Duration of the<br>project (months) | % of<br>use for the project | Depreciation<br>period<br>(months) | Eligible cost |
|--------------------|---|------|-------------------------------------|-----------------------------|------------------------------------|---------------|
|                    |   |      |                                     |                             |                                    |               |
|                    |   |      |                                     |                             |                                    |               |
|                    |   |      |                                     |                             |                                    |               |
| <b>Sub-total 3</b> |   |      |                                     |                             |                                    | <b>0</b>      |

#### Other direct costs

|  | Precisions                | Eligible costs |
|--|---------------------------|----------------|
| consumables  |                           |                |
| Travel costs   |                           |                |
| equipment<br><i>(reported from the above table!)</i> | 0<br>0<br>0<br>#REF!<br>0 | 0<br>#REF!     |
| Other direct costs                                   |                           |                |
| <b>Sub-total 4</b>                                   |                           | <b>#REF!</b>   |

|                     |              |
|---------------------|--------------|
| <b>Direct costs</b> | <b>#REF!</b> |
|---------------------|--------------|

#### Indirect costs

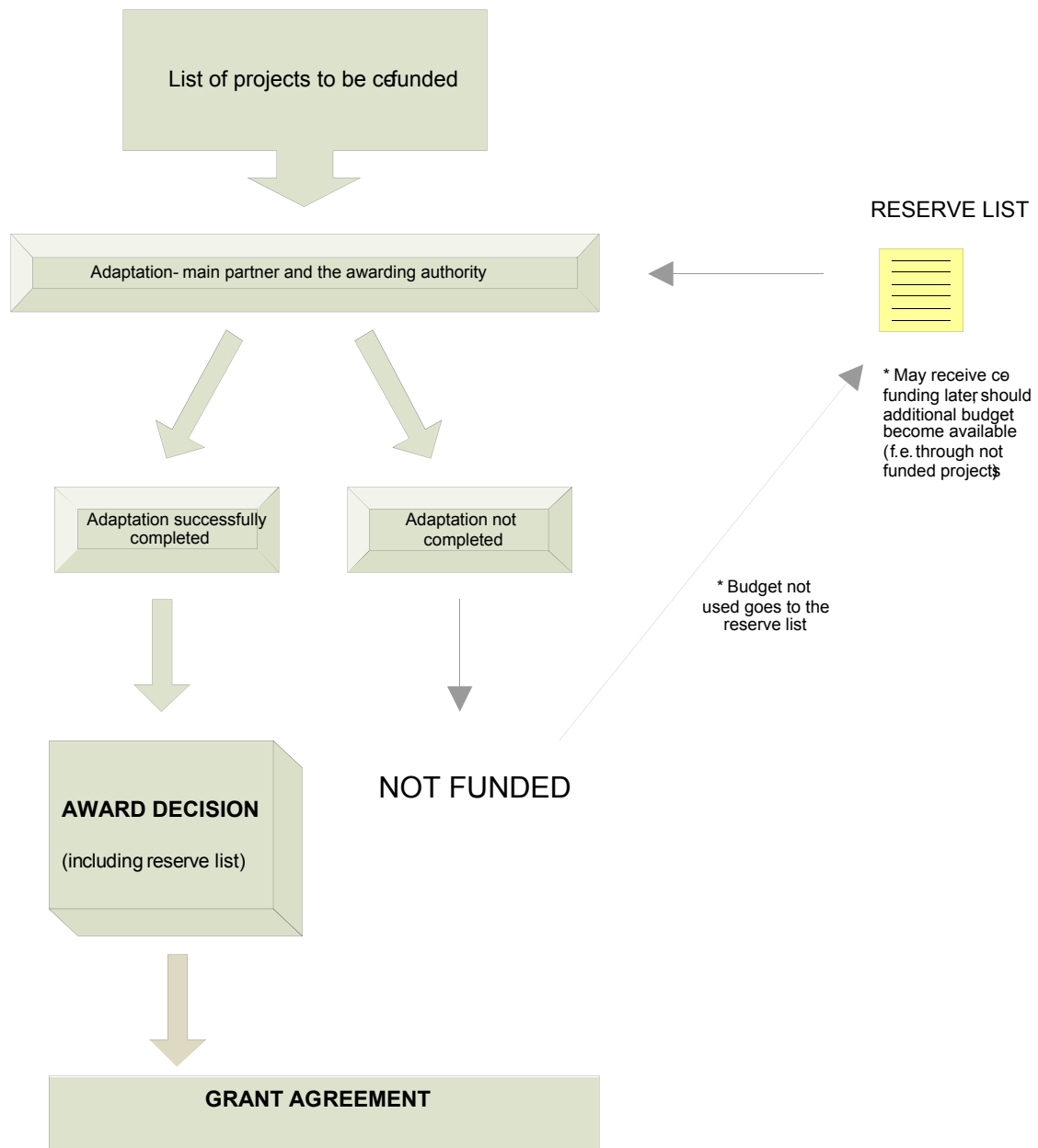
| Reported from the "BeforeStarting" sheet |  |   | Indirect Costs |
|--|--|---|----------------|
| Indirect costs                           |  | 0 | #REF!          |

|                        |  |
|------------------------|--|
| <b>Sub-contracting</b> |  |
|------------------------|--|

|                             |              |
|-----------------------------|--------------|
| <b>TOTAL costs</b>          | <b>#REF!</b> |
| <b>TOTAL eligible costs</b> | <b>#REF!</b> |
| EC funding rate             |              |
| <b>EC funding</b>           | <b>#REF!</b> |



Figure 13: Process following the recommendation for EU co-funding.



Chafea trusts that you find this guide for applicants useful. You are welcome to provide feedback and comments by writing to [CHAFEA-HP-CALLS@ec.europa.eu](mailto:CHAFEA-HP-CALLS@ec.europa.eu).





| REPORT  | Expenditures    |            | Provisional budget appended to the grant contract |                  | Expenditures incurred |            |                    | comments         |
|---|-----------------|------------|---|------------------|-----------------------|------------|--------------------|------------------|
|   | Unit            | # of units | Unit costs (in EUR)                               | Costs (EUR)      | Unit                  | # of units | Unit cost (in EUR) |                  |
| <b>1. Human resources</b>   |                 |            |   |                  |                       |            |                    |                  |
| <b>1.1 Salaries (grosses amounts, local staff)</b>                  |                 |            |   |                  |                       |            |                    |                  |
| 1.1.1.1 Paris - Physician director - Time in Paris                  | Per month       | 36         | 7 530,00  | 271 080          | Per month             | 36         | 7 600,00           | 273 600          |
| 1.1.1.2 Lyon - Physician - 41,66%                                   | Per month       | 36         | 1 698,00  | 61 128           | Per month             | 36         | 1 698,00           | 61 128           |
| 1.1.1.3 Lyon - Psychologist - 30%                                   |                 |            |   |                  | Per month             | 3          | 1 300,00           | 3 900            |
| <b>1.2 Per diem for missions</b>                                    |                 |            |   |                  |                       |            |                    |                  |
| 1.2.1 PER DIEM - network meetings                                   |                 |            |   |                  |                       |            |                    |                  |
| UK  | Per diem        | 2          | 250,00  | 500              | Real costs            | 1          | 174,00             | 174,00           |
| USA (participation to the refugees international conference)        |                 |            |   |                  | Real costs            | 1          | 184,00             | 184,00           |
| <b>Under amount human resources</b>                                 |                 |            |   | <b>332 708</b>   |                       |            |                    | <b>338 986</b>   |
| <b>2.1. Travel</b>  |                 |            |   |                  |                       |            |                    |                  |
| 2.1.1 Paris / Glasgow   | Per flight      | 3          | 480,00  | 1 440            | Per flight            | 2          | 357,00             | 714              |
| 2.1.1 Paris / Washington (Refugees international conference)        |                 |            |   |                  | Per flight            | 1          | 825,00             | 825              |
| <b>Under amount Travels</b>   |                 |            |   | <b>1 440</b>     |                       |            |                    | <b>1 539</b>     |
| <b>3. Equipment, material and supplies</b>                          |                 |            |   |                  |                       |            |                    |                  |
| 3.1.1 Paris - Computers   | Per part        | 2          | 1 000,00  | 2 000            | Per part              | 2          | 1 000,00           | 2 000            |
| 3.1.2 Paris - Computers   | Per part        | 1          | 1 200,00  | 1 200            | Per part              | 1          | 1 200,00           | 1 200            |
| 3.2.3 Paris -Car for the Lyon center                                |                 |            |   |                  | per car               | 1          | 3 200,00           | 3 200            |
| <b>Under amount Equipment Materials and supplies</b>                |                 |            |   | <b>3 200</b>     |                       |            |                    | <b>6 400</b>     |
| <b>4. Other costs, services</b>                                     |                 |            |   |                  |                       |            |                    |                  |
| <b>4.1 Publications</b>   |                 |            |   |                  |                       |            |                    |                  |
| Promotional publications - Provider (graphics)                      | Per publication | 3          | 2 500,00  | 7 500            | Per publication       | 2          | 2 380,00           | 4 760            |
| <b>4.2 Audit costs</b>  |                 |            |   |                  |                       |            |                    |                  |
| Financial auditor (annual audit)                                    |                 |            |   |                  |                       | 1          | 1 600,00           | 1 600            |
| <b>4.3 Financial services (costs for bank guarantee)</b>            |                 |            |   |                  |                       |            |                    |                  |
| Financial services (costs for bank guarantee, etc)                  | per trimester   | 12         | 250,00  | 3 000            | per trimester         | 12         | 183,00             | 2 196            |
| <b>4.4 Costs for conferences/seminars</b>                           |                 |            |   |                  |                       |            |                    |                  |
| Training of the professionals (6 d/year 15 pers)                    | Per lunch       | 270        | 25,00   | 6 750            | Per coffee-break      | 270        | 5,00               | 1 350            |
| <b>Under amount Other</b>   |                 |            |   | <b>17 250</b>    |                       |            |                    | <b>9 906</b>     |
| <b>5. Under amount of the eligible direct costs</b>                 |                 |            |   | <b>354 598</b>   |                       |            |                    | <b>356 831</b>   |
| <b>5. Contingency reserve (Max 5% of the eligible direct costs)</b> |                 |            |   |                  |                       |            |                    | <b>17 842</b>    |
| <b>5. Under amount of the eligible direct costs</b>                 |                 |            |   | <b>354 598</b>   |                       |            |                    | <b>374 673</b>   |
| <b>6. Administrative costs (maximum 7 % of 5)</b>                   | 7,00%           |            |   | <b>24 821,86</b> | 7,00%                 |            |                    | <b>26 227,08</b> |
| <b>7. Total of the eligible costs (5 + 6)</b>                       |                 |            |   | <b>379 420</b>   |                       |            |                    | <b>400 900</b>   |

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*Impression Dupli Print – Domont (95)*