eunice MANAGEMENT | peer-IR-view project

KEY INFORMATION TO LAUNCH AN ERASMUS+ KA2 - PARTNERSHIP FOR COOPERATION PROJECT - HINTS AND TIPS

Handbook

Key information to launch an Erasmus+ KA2 – Partnership for Cooperation project - Hints and Tips

INTRODUCTION

« Key information *to launch an Erasmus + KA2 – Partnership for Cooperation projects*» is a ready-to-use toolkit made up of a handbook and 7 documents.

The handbook provides guidance on how to follow the rules of the Partnership for Cooperation projects funded by the Erasmus+ Programme 2021 – 2027, tips and hints on the activities to be taken before the project's launching ; the additional documents help in setting the project management.

The toolkit has been developed by International Relations Office (IRO) staff for IRO Staff and it is the result of a process of analysis of IROs' needs, research and daily work experience.

Following the goal of the Erasmus+ KA2 - *Peer-IR-view* project- this toolkit aims to facilitate the transfer of knowledge, skills sharing, synergies creation among IROs and IRO's staff, defining procedures and providing templates.

This toolkit is particularly recommended in case of office turnover as first guidance for newcomers who have to work on Erasmus+ KA2 Partnership for Cooperation projects.

IRO newcomers will benefit from this toolkit as they will independently know what to do before launching a newly funded Erasmus+ KA2 Partnership for Cooperation project, identifying Who has to do What and When. This will help to avoid waste of time and prevent loss of know-how.

1 ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT: NOW IT'S SIMPLER!

Before illustrating the steps to be taken to launch an Erasmus+ KA2 Partnership for Cooperation project, we would like to recall the updates introduced by the Erasmus+ 2021 – 2027 Programme .

The Erasmus+ Programme 2021 – 2027 simplifies the funding rules for Partnership for cooperation projects in respect to similar projects funded by the Erasmus+ Programme 2014 - 2020.[1]
The **funding model** is now based on a single **lump sum** chosen by applicants at the application stage according to the costs of the project, calculated on needs and objectives. This model matches the ambition and the expected outcomes of the project.
According to the amounts required, you can distinguish small scale partnership or cooperation partnership . This choice will determine, also the level of complexity of the administrative and reporting requirements.
The single lump sum covers the whole cost of the eligible activities linked to the implementation of the project that can be summed up in the following list:

- project management (planning, finances, coordination and communication between partners, monitoring and supervision, etc.)
- learning activities
- teaching and training activities
- meetings and events
- project deliverables (publications, materials, documents, tools, products, etc.)
- activities aimed at sharing the project's results : e.g. travel and subsistence; equipment; costs for publication and editing of materials; IT development (such as creating a website); staff and human resources costs; administrative costs; etc.

Please note that*: "As all grants funded by the European Union budget, contributions in the context of this action shall comply with the principles of co-financing and no-profit. The principle of co-financing implies that the resources necessary to carry out the action are not provided entirely by the grant. Co-financing may be provided in the form of the beneficiary's own resources, income generated by the action or financial or in-kind contributions from third parties. (…) In line with the no-profit principle Grants shall not have the purpose or effect of producing a profit within the framework of the action or the work programme of the beneficiary "[2].*

TO GO DEEPER: In 2021, the Erasmus+ financial rules for KA2 - cooperation project changed. Unit costs were replaced by lump sum costs , meaning that the beneficiary

[1] In this section of the handbook, you will find some information on the funding model of the Erasmus+ KA2 Programme 2021 – 2027. Please note that the source of information is the « *Handbook on the lump sum funding model Erasmus+ Programme - Call 2022* « .

[2] *Handbook on the lump sum funding model Erasmus+ Programme - Call 2022*, p. 7

is no longer required to provide time sheets to describe the activities performed for the project. Actually, some beneficiaries decide to continue to report the project activities, but just for internal reasons.

2 HOW DO I KNOW IF MY ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT HAS BEEN FUNDED ?

Applicants receive an official letter from the Erasmus+ National Agency announcing the result of the selection procedure, the score achieved for each award criteria and, if your project passed the selection, the amount of the awarded grant and the next steps to formalize the funding.
The Erasmus+ National Agency will also publish the list of the funded projects on its website.

3 MY ERASMUS+ KA2 – PARTNERSHIP FOR COOPERATION PROJECT HAS BEEN FUNDED : WHAT SHOULD I DO NOW ?

In this paragraph you will find the list of the essential steps to follow to launch your project.

1) First step: contractualisation
2) Second step: planning of the activities
3) Third step: set the financial management and reporting procedures
4) Fourth step: launch the project - kick-off meeting.

Let’s start! Below you will find more detailed information on how to proceed.

4 STEP ONE – CONTRACTUALISATION

4.1 WHO ARE THE MAIN ACTORS OF THE ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT ?

In the Erasmus+ KA2 Partnership for Cooperation Project the main actors are:

- ✓ **the Coordinator (Beneficiary).** It is the Institution that signs the grant agreement with the National Agency and represents all the project partners. The coordinator receives the grant and transfers it to the project partners according to the agreed budget;
- ✓ **the Partners (Co – Beneficiaries**). They are the Institutions who carry out the assigned activities under their own responsibility, within given deadlines in coordination with partnership.
- ✓ **The Erasmus+ National Agency**. It is the Institution that deals with the Erasmus + programme at National level.

4.2 WHICH ARE THE BINDING DOCUMENTS BETWEEN THE ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT ACTORS ?

Once the Erasmus+ KA2 Partnership for Cooperation project is funded, it is necessary to formalize it through the following binding documents :

1) the grant agreement and its annexes. It is established and signed between the legal representative of the coordinating institution and the Erasmus+ National Agency and constitutes the basis of the contract between the beneficiary institution and the funding provider. In this document you will find the most important information about the obligations and the rights of the coordinator; the timing of the project and its activities and the terms and the way in which the grant will be transferred to the coordinator. It includes some annexes, the most important of which are the general conditions, the financial rules, the agreed budget, etc. Essential information for the smooth running of the project and all the elements of financial management are included. It is a standard template provided by the Erasmus+ National Agency.

2) The Erasmus+ National Agency uploads it on the web platform dedicated to the programme together with all its annexes and the guide explaining how to fill and sign it.

TO GO DEEPER: Please note that the European regulation does not replace national laws or internal regulations of your institution. Therefore, for the implementation of the activities, it is necessary to refer to the European, national and institutional procedures.

3) the partnership agreement and its annexes. It is established and signed between the coordinating institution of the project and the partner. The coordinator prepares and shares the partnership agreement with its partners. This document can be a bilateral or a multilateral one and has to be signed by the Coordinator and the Partners' Legal Representatives. This agreement defines the obligations of each

partner, particularly under the financial and reporting point of view. After the Consortium Agreement has been signed. Partners receive the first transfer of funding according to the budget assigned from the coordinator.

4.3 WHICH ARE THE RESPONSIBILITIES WHEN IMPLEMENTING THE ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT ?

Coordination is the responsibility of the beneficiary, but the management engages the responsibility of each partner. As soon as the project is launched, it is necessary to ensure the support and the understanding of all members of the consortium. It is necessary that the partnership works in the framework of the Erasmus+ programme following the rules of the programme, aiming at the objectives of the project and pointing at the expected results and outcomes to be delivered.

More specifically:

1) **The coordinator** ensures the proper implementation of the activities, as detailed in the application and in accordance with the grant agreement and its annexes. . The coordinator:
   - ✓ establishes a solid and committed partnership through the partnership agreement to ensure that all partners are aware of their roles and responsibilities;
   - ✓ verifies that clear and effective mechanisms are in place for communication and coordination between partners as well as appropriate provisions for monitoring, in particular referring to the project work plan;
   - ✓ sets up regular internal reports between partners and the coordinator, to facilitate project monitoring.
   - ✓ updates the Erasmus+ Project Results Platform with finalized project results as appropriate;
   - ✓ complies with agency control procedures when requested.

2) **Partners** have to:
   - ✓ inform the coordinator of any change of name, address, legal representative, legal situation, financial, technical, organizational;
   - ✓ communicate at the coordinator any event likely to affect or delay the implementation of the project;
   - ✓ submit in good time to the coordinator all the data, documents or information necessary for the establishment of the reports, audits, controls, monitoring or evaluation.

Associated tool: *Annex1_Partners_register.xls*
As you know, an Erasmus+ KA2 Partnership for cooperation project can involve many different universities, each of them assigning many people from different units to the project, endorsing specific roles and responsibilities. Partners' register allows to keep track of key information regarding the involved people such as : name, university, service or department, roles and responsibilities internally and in the project, contact information. This template can also be used as a contact list.

5 STEP TWO - PLANNING THE ACTIVITIES

Once your project has been funded, you need to organize the work before its launching. Planning the activities, in fact, is crucial for the success of the project. Note that you need to work on two levels: at internal level (inside your institution) and at international level (with your partners).

5.1 WHO DO I NEED TO CONTACT INSIDE MY INSTITUTION TO SET THE ACTIVITIES?

The implementation of the Erasmus+ KA2 Partnership for Cooperation project is a team work. Once your project is funded, other departments in your institution will help in its successful implementation. Therefore, i t is very important to identify a contact person in each of them.

The Human Resources Department has to be involved with regards to the staff who will work on the project in order to verify their formal qualification . It is important to be sure that all the people working on the project have a formal link with the organization (e.g., contract).

HR Department supports the project team in monitoring HR positions and procedures and in payroll management. It is the privileged point of contact for the execution and management of personnel costs.

The Financial Department supports the project team by ensuring certified financial statements that comply with accounting standards; it follows the opening and assignment of credits; and it gives advice and expertise on financial aspects.

Communication Department: it accompanies the project team and gives advices on how to enhance the Erasmus+ KA2 project.

Legal Affairs Department: evaluates and validates partnership agreements. It can be called on at any time during the project to provide advice or evaluate a legal issue.

5.2 HOW DO I ORGANIZE THE WORK WITHIN THE PARTNERSHIP ?

You may start by **defining a steering committee** that facilitates decision-making and diffusion of information.

After , prepare the work for partners in order to summarize the different activities (work packages) and make the link with the deliverables. It is also necessary to review the tasks assigned to each partner , deadlines and schedule. During the application phase, the activities are planned for the duration of the project in a reasonable timeline. ome changes may often occur in activities planning, for this reason it can be necessary to make adjustments.

The Project charter and deliverable cards can help you in this phase.

Associated tool: *Annex2_project charter.docx*
A project charter aims to support the consortium in initiating the project by documenting its essence, as defined in the application, but in a more accessible, readable and summarized way. In fact, project applications can be very heavy, their key content being drowned among technical information of no use for project participants. The project charter can be used by partners, for instance, to: - communicate within their institution about the project and share a common understanding; - inform on applications for organizational resources; - agree on preliminary high-level roles and responsibilities for project activities. More generally, the document should contain high level information and general overviews of the content, plans and objectives of the project.
Associated tool: *Annex3_deliverable card.docx*
The Erasmus+ Partnership for cooperation projects are built around deliverables or project outputs. Deliverable cards can be used in addition to the project charter (see above) to update deliverables description as submitted in the application, in line with possible changes occurred among the pstyn and/or the tasks distribution. This “card” describes the content of the deliverable and the work division between partners. It also allows to describe the subsequent tasks, associated workload and foreseen deadlines for creating the deliverable and delivering it on time.

Hints and Tips	You can also use the Gantt Chart available on the internet . Gantt charts are useful for planning and scheduling projects. They help you assess how long a project should take, determine the resources needed, and plan the order in which you will complete tasks. They are also helpful for managing the dependencies between tasks

After this, **it is the moment to schedule partners’ meetings**. Communication within the partnership is vital for the success of the project. Among the ways of communication, virtual and in presence meetings will help organise the project work and monitor the related activities. The meetings calendar can include meetings for the whole partnership or meetings dedicated to thematic task forces .

Tips and Hints	*Sharing the meeting schedule with the partners is fundamental not only to find a suitable time slot for everyone but also to establish a frequency (weekly, monthly, etc.) helpful for project running.*

5.3 HOW CAN I EASILY SHARE THE PROJECT DOCUMENTS?

One best practice in work organisation within the Erasmus+ KA2 – Partnership for Cooperation project is to choose a joint project platform to enable, at least, documents sharing amongst partners. It is important to ask IT departments of each partner to assure that the chosen platform is usable and works in accordance to local requirements for data safety. . Even if the main functionalities are the document storage, the sharing and co-editing for purposes of efficient group working, other features can be added that motivate the choice of a platform (i.e., chat, discussion forum, Gantt charts, tasks managing tools, etc.).
Once the platform is chosen, it is important to set up a consistent access management policy to make sure partners have access and to clearly identify a procedure to grant new accesses. Also, take good care of building an appropriate and user-friendly folders hierarchy and naming requirements for your files to make sure all users will easily find their way when looking for a specific document on the platform.

5.4 HOW CAN I SET THE MONITORING PROCESS OF MY ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT?

Monitoring the project activities and its issues, changes and risks is mandatory during a project lifecycle. Moreover, reporting on these matters is clearly asked by Erasmus+ National Agencies for reporting activities. Below you find some project logs that can help you.

5.4.1 PROJECT LOGS

Different kinds of logs can be used to keep track and monitor project implementation, issues and changes. Before sharing and setting up such logs, the monitoring approach and especially the process and responsibility for their maintenance should be clearly defined and agreed on with the partners (for example in the Project Management Plan, see below).

Associated tool: *Annex4 and 5_issues and changes log.xlsx*
Issues encountered during the implementation of the project activities (difficulties, conflicts, misunderstandings, staff turnover, …) can be raised by any project's stakeholder by using this log, that have been previously shared on the project platform (see above). The document should be kept up-to-date with not only the issues raised but also the solutions proposed and implemented as well as their effectiveness . As most projects are written long before they are actually funded and implemented, it is very likely that modifications will occur during the project lifecycle. It is mandatory to keep good track of such changes, also for reporting purposes. Please note that the changes log provided in this toolkit only proposes to keep track of changes that have already occurred and therefore have been validated. Requests for change should be submitted by using the issues log (see above).

Associated tool: *Annex6_risks log.xlsx*
The risk log supports the project team in logging and tracking risks and in planning the actions that can be implemented to mitigate them.

Tips and Hints	Through a SWOT analysis, y ou can investigate Strengths and Wicknesses (internal factors), Opportunities and Threats (external factors) of your project. It is strongly recommended to conduct such an analysis at the time of writing and planning the project. When time comes to launch the project, it is crucial to update the analysis, monitor the previously identified risks and keep this monitoring up-to-date during the whole project lifecycle. Using a risks log helps to keep good track of the risks severity (see table below) and to identify and monitor new ones. The available template in the toolbox proposes to monitor the risks according to the scheme below: analysis of the potential impact and identification of a risk severity level (from low to critical) calling for a corresponding and appropriate answer from project leaders.

5.5 WHAT A PROJECT MANAGEMENT PLAN IS? HOW CAN I WRITE IT?

The *Project Management Plan* is a document illustrating the selected approach for implementing project goals. It also highlights key controlling and monitoring processes to be used, project policies and rules, and the overall management approach. The *Project Management Plan* is important in defining the outputs of the planning (i.e., it defines the plans necessary for managing the project as well as to what extent they should be customized or/and tailored). Therefore, the *Project Management Plan* becomes the basis for managing the project throughout its lifecycle and is a point of reference for all project members and stakeholders. It also represents the front door for any new internal stakeholder joining the project after its launch. The *Project Management Plan* must be kept up-to-date throughout the lifecycle of the project.

Hints and tips	Start explaining and illustrating the following aspects: ● Key project documents and tools ● Roles and responsibilities ● Decision making process ● Communication management ● Project progress measurement

6 STEP THREE - SET THE FINANCIAL MANAGEMENT AND THE REPORTING PROCEDURES

6.1 CHECK YOUR INTERNAL FINANCIAL PROCEDURES

As mentioned in Step Two section, before starting the Erasmus+ KA2 – Partnership for cooperation project activities, it is necessary to meet your internal financial department to be sure you have implemented all the necessary procedures to receive the financial transfer (e.g. credits opening, bank account, creation of an internal financial code corresponding to the project funding, national procedure to monitor the EU funding, etc.) and to prepare the financial documents for the budget spending and eventually share it with the competent financial officer within your institution.

6.2 HOW CAN I FINANCIALLY MANAGE MY ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT?

Financial management is a key activity within the project. To make your project a successful one you need to use all the granted budget at its best. That means: spending the assigned funding in its entirety respecting the commitments of the Grant Agreement signed with the Erasmus+ National Agency.

When an Erasmus+ KA2 Partnership Cooperation project is funded, the beneficiary receives the lump sum as requested in the application and has flexibility in spending the granted budget for each work package.

It is important, however, to remember that, « *at reporting stage, the amount paid for each work package will always be the same as what was allocated at application stage and will only depend on the level of achievement of the objectives of the work package. In case that, during the implementation of the project, a beneficiary needs to modify the budget allocated to a work package and the related list of activities, this can be done by requesting an amendment. The amendment request will be assessed by the NA/EACEA and, if approved, it becomes part of the grant agreement »[3].*

It is useful to define a financial monitoring process. You can use a template (e.g. excel file) in order to record your financial budget per work package and keep your file updated throughout the whole project in order to ensure a 100% budget spending or to prevent any potential time-gap .

Hints and tips	The management of the Erasmus+ grant budget involves advancing the resources used to carry out the activities. Thus, the implementation of financial management tools (monitoring table, financial update after each activity) will allow good balance between available resources and expenses optimizing the expenditures of the budget assigned to each work package. For effective administrative and financial management, each partner should ensure: the implementation of internal budget monitoring from the start of the project and the designation of a reference resource person. All the expenses must be borne by project financing . In order to avoid any issue in case of an audit, it is important and useful to keep track of the funding spending (i.e., human resources' hiring, travel expenses).

[3] Erasmus+ Call 2022 - Handbook on the lump sum funding model, p. 8.

6.3 WHAT DO I NEED TO KNOW ABOUT MY ERASMUS+ KA2 PARTNERSHIP FOR COOPERATION PROJECT REPORT?

Before launching your project, it is important to bear in mind how to report the Erasmus Project.

You need to follow different procedures, always taking into account if your project is a small-scale partnership or a cooperation partnership[4].

In the first case you have to report at the end of the project implementation. You need to follow 3 Criteria (“Quality of the partnership”, “Quality of the project implementation” and “Relevance and Impact”) and give a description for each of them. You are also required to provide a self-assessment (score from 1 to 100) and a list of elements of supporting evidence (e.g. list of attendance in case of meetings, agenda of the events, photos or video of the activities realized). Note that you do not need to submit each document. You have to submit all of them only at the specific request of the National Agency.

In the second case, you need to provide a mid-term report and a final report. The report is based on the following structure: project management, project implementation, and dissemination and impact., Beneficiaries must provide a self – assessment (score from 1 to 100) based on the comparison between indicators set in the application form and results achieved during and after project's implementation. The achieved results must be supported by relevant documents such as project deliverables, meeting minutes, meetings’ agenda, attendance list of the meetings. More specific documents can be requested by the National Agency in case of an in-depth analysis.

7 STEP FOUR - LAUNCH THE PROJECT: ORGANIZE THE KICK-OFF MEETING

It’s time to organize the kick-off meeting. It is the first meeting held by the coordinator together with all the partners marking the start of project implementation. The kick-off meeting is the opportunity to remind the objectives and deliverables of the project . During this meeting, you can illustrate and share the management setting (working arrangements, distributions of tasks, respects of the project timeline, meetings’ agenda, etc). It is on this occasion that the coordinator explains to the partners what are the contractualisation steps, reminds the assigned budget to each partner, the timing and the way through which they will receive the funding, and explains the reporting rules by summarizing the European regulations that should be followed.

[4] Please note that you can find more detailed information in the KA2 – Partnership for Cooperation Handbook on the lump sum funding model, Erasmus + Call 2022.

Associated tool: *Annex7_Checklist_Launching.xlsx*
This tool will help you to check if all the preparatory activities to launch the project have been done.

7.1 … AND FINALLY: HERE WE ARE!

Now you are well equipped: you have set the framework of all the aspects needed to run your Erasmus+ KA2 Partnership for Cooperation project, you can **launch it**! …and enjoy your project!