



EDUCATION
TRAINING
YOUTH

TEMPUS

Joint European Project
Management Handbook

Phare



EUROPEAN
COMMISSION

TEMPUS

**Joint European Project
Management Handbook**

Phare

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by

M.H. Dominiczak,
University of Glasgow, UK

in collaboration with



European Training Foundation

Tempus Department

Villa Gualino

Viale Settimio Severo 65

I-10133 Torino

ITALY

Tel.: (39)11-630.22.22

Fax: (39)11-630.22.00

E-mail: tempus@etf.it.

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Main abbreviations:

ECE:	Eastern and Central European (countries)
ETF:	European Training Foundation
JEP:	Joint European Project
RBAP:	Revised Budget and Activity Plan

1. THE PURPOSE OF THIS HANDBOOK

The difference between the success and failure of the project involving international cooperation often depends on the quality of its management. This handbook is designed to help coordinators of Tempus-Phare Joint European Projects (JEPs) to manage their programmes. We aim it particularly at those who are about to start their first JEP. The handbook reflects the experience of several project coordinators and of the staff of the Tempus Department of the European Training Foundation (ETF). We hope it is practical enough to help project coordinators solve everyday problems.

2. SUPPORTING DOCUMENTS

This handbook is not a part of your JEP contract. Its main aim is to provide guidance and advise on goal oriented project management. It should be treated as complementary to the documents distributed when the funding for a JEP is awarded. These are:

- a) The JEP Contract including the Guidelines for the Utilisation of the Grant.
- b) Your own Project Application and Revised Budget and Activity Plan (RBAP).

These documents are described in detail in Chapter 9.

3. INTRODUCTION: THE TEMPUS-PHARE PROGRAMME

Tempus-Phare, a Trans-European Cooperation Scheme for Higher Education, is a part of Phare, a wide ranging programme aimed at restructuring the economy in Central and Eastern Europe. Tempus was adopted by the Council of Ministers of the European Community on 7 May 1990 for the period 1990 to 1994 and extended on 29 April 1993 from 1994 to 1998 (Tempus II). The body responsible for the management of the Tempus programme is DG XXII. The European Training Foundation (ETF) Tempus Department assists DG XXII in the administration of the programme. National Offices have been set up in the ECE countries to facilitate liaison with the appropriate national higher education institutions.

Objectives of the Tempus Programme are:

1. To promote the quality, and to support the development and renewal, of higher education systems in Eastern and Central European countries (hereafter ECE countries). (In Tempus documents, participating ECE countries are referred to as "partner countries").
2. To encourage the cooperation between ECE countries and the European Union and G24 countries.

3.1. Joint European Projects (JEPs)

Joint European Projects (JEPs) account for the largest part of Tempus budget. Approximately 450 JEPs are currently ongoing in Europe. In the 1995/96 academic year 80% of new projects have been coordinated from the ECE countries and in 45% of cases the ECE institution will be project contractor. There are two types of JEP: Structural JEPs and Mobility JEPs. Structural JEP focuses on the restructuring and modernisation of a chosen aspect of the higher education system in the ECE country and may contain an element of staff and student exchange and training (mobility). The aim of the Mobility JEP is to create a network for the exchange of undergraduate and/or postgraduate students involving ECE, EU and possibly G24 countries.

JEPs typically have three or more partners in at least three countries. The funding is awarded for up to three years. **JEP partners** can be universities, enterprises or other organisations such as professional bodies etc. Organisations from G24 countries can be partners in JEPs but are required to fund their own participation. Funds awarded through EU do not cover G24 country participation.

3.2. JEP philosophy

The goal. The Phare programme supports economic and social reform in Eastern and Central Europe (ECE). In the context of this objective, Phare supports the Tempus scheme due to the influential role which higher education institutions play in the overall reform process.

The Tempus scheme aims to facilitate the development of reform according to the specific requirements of each of the ECE countries. The success of the overall Tempus scheme largely depends on how effectively JEP activities support the long term policies for educational reform in a given country.

Similarly, at an institutional level, the success of individual JEPs depends on how effectively their activities are integrated into the development policies of the participating institutions.

The JEP is a **goal-orientated** project. The objective of the project is defined in the contract. Each JEP normally comprises a number of different activities. It is essential that each of the activities is consistent with the overall objective of the project. It is important to remember that an institution receives the grant to achieve the overall objective, and not just to implement a particular activity, such as staff exchange.

Goal-orientated management requires both leadership and flexibility. As stated above, the priority for the JEP coordinator is to achieve the project objective with the resources he or she has available. The challenge of project management is to maximise the use and impact of the resources. Accordingly, the contractor and coordinator of the project have considerable powers to modify the individual activities in order to achieve a more substantial impact. It is better to modify, or even abandon, an activity which is clearly not producing results, than to adhere rigidly to the original plan. The coordinator must keep the project team focused on achieving the overall objective.

3.3. JEP activities: Achieving the goal

The most common activities are listed below. Activities are your tools to achieve the goal. The Project Management Group should be constantly discussing whether each of the ongoing activities is helping to achieve the overall objective of the project. If the answer is "no", you are probably wasting your time and money. Modify or terminate the activity in question.

JEP activities	
1	Development of the undergraduate and postgraduate curriculum including preparation of teaching materials.
2	Mobility of staff and students.
3	Development of new management structures within the higher education systems.
4	Upgrading of facilities/purchase of new equipment.
5	Development of teaching materials.
6	Organisation of intensive courses.
7	Development of university/industry relations.
8	Creation and restructuring of higher education centres.

4. THE PROJECT TEAM

It is impossible to run a successful JEP without team support. The coordinator must ensure that a team of individuals is available at each partner institution. Confirm your list of participants with the project leader of each institution at the beginning of the project. Make sure that the Project Management Group assigns everybody some responsibility soon after commencement of the project. Do not allow your team to disappear through inactivity. During your visits to partner institutions, make an effort to personally meet as many participants as possible.

4.1. Team-building

Your team is your most important asset. Team building is essential for the JEP coordinator. Inevitably, every project relies on a small number of key players. Select your key team members carefully and cultivate them. Recognise achievements. Individuals work better if you give them real responsibility. Delegate as much executive responsibility to your key players as possible. Make sure your team members receive appropriate credit for what they achieve. Always seek new members for the core team: spot new talent. Make sure that people who need to collaborate closely meet early: it is much easier to communicate by fax or E-mail once individuals have already met personally. To ensure the long-term effectiveness of the project in ECE universities, it is important to gradually shift the executive responsibility

for the project towards the ECE partner institution. The involvement of local academics should steadily increase throughout the project so that, at the end of the funding period, all the activities can be taken over by local staff.

Since problems may occur if a key person changes position or leaves during the project, it is important to designate deputies for key team members.

4.2. Involvement of all the partners - Image of the project

Involvement of all the partners in the project is essential. The impact of your programme will be greater, and its assessment better, if there is a balanced participation from all partner institutions. Make clear to the partners that participation in the programme is an individual as well as institutional commitment: the individuals involved represent the institution. If their personal or professional circumstances change and make their participation in the project difficult, the institution should designate other individuals to continue the project. Part of the team building is to develop the identity and image of the project. Development of the project identity increases the cohesion of the group and creates "ownership" of the project. Define functions for individuals (e.g. Project Leader, Deputy Project Leader) and make it formal so that they can put this in their curriculum vitae. JEP folders, newsletters and stationery are not expensive and help to build project image. Print visiting cards for key individuals to facilitate contacts at conferences etc.

ECE university staff members trained in EU institutions, and EU university staff who gained teaching experience in ECE countries, are by having working experience in both systems, the most valuable members of the project team. Use their expertise. It is a good idea to assign such individuals key positions within the project as soon as possible. Nothing guarantees the project success more than a team of individuals familiar with both ECE and EU institutions and work practices.

5. MAKING YOUR PROJECT PART OF THE TARGET INSTITUTION (INSTITUTIONAL EMBEDDING)

JEPs aim to create substantial change within target institutions. In any environment, quick change creates a degree of resentment, mistrust and defensiveness. Substantial change can only be achieved if members of the project team have sufficient local authority and support to implement and maintain changes. Make sure that you know the level of seniority of your partners, and their exact position within their institutions. If their position is too weak to influence the department/faculty, seek their advice on how to obtain support from more influential individual(s).

The effectiveness of training programmes in the EU will also depend on whether the project is regarded as an important institutional activity at a local level. The larger the project, the more support it needs from the host institution.

Ensuring that the target university regards JEP activities as "its own" is one of the most important tasks of the project coordinator. The Project Management Group needs to meet regularly with university authorities to ensure that JEP activities are incorporated into University development plans. Avoid at all costs the project being seen as a private activity of a small group of individuals.

The participation in a JEP takes a substantial amount of time of the academic and administrative staff. The authorities in partner institutions need to be aware of this demand on their resources. The Coordinator should clarify the situation with the relevant heads of departments. At an early stage of the programme, the project should be discussed at faculty level. Such discussions not only establish lines of communication but also pave the way to asking for assistance if required later. Coordinators should also remember to talk with senior members of the relevant departments, other than those directly involved in the project. Lack of communication is one of the most common factors in a reducing the impact of the project. If there is no solid institutional support or individual interest in the project, all activities will lose momentum soon after JEP funding finishes.

It is essential to maximise the project's impact on the institution as a whole. The best way to do this is through demonstrating the project's usefulness to the department or faculty. Inform the relevant authorities of activities, such as language courses, seminars, etc., which are open to individuals from departments not directly involved in the project. Make sure that the information about the project is passed on to the information services at the University, so that it appears in newsletters, etc.

JEPs enhance the international image of all participating institutions, but this will only happen if the information about the project is adequately distributed.

6. HELP AVAILABLE TO THE PROJECT MANAGEMENT GROUP

It is essential for the coordinator to develop working relationships with the following:

6.1. University International Offices

The staff of University International Offices are usually familiar with running international programmes, the logistics of staff exchange, etc., and give invaluable assistance to project coordinators.

6.2. University Finance Office

The expertise of a University Finance Office is also invaluable to the project. Please note that handling foreign transfers and multi-currency accounting are still relatively new activities in some institutions.

6.3. National Tempus Offices

Contacts with National Offices in ECE countries are particularly important for ECE coordinators and project leaders. NTOs can be consulted on project management and financial procedures, as well as on issues arising from local circumstances, i.e. conflicts among partners, ongoing Tempus projects in the area etc.

6.4. European Training Foundation (ETF)

Each JEP has an assigned Desk Officer within the Tempus Department of the ETF. Desk Officers are expert in contractual matters and are committed to the success of projects for which they are responsible. Contact your JEP Desk Officer whenever you need assistance with the interpretation of the contract or advice on the management of your project. The manual *Guidelines for the Utilisation of the Grant* lists a number of circumstances when you **must** obtain authorisation from your Desk Officer before action is taken. Please note that post factum authorisation is **not** granted. It is particularly important that coordinators form links with the Office early on in the project. Any partner is welcome to contact the ETF, but one should remember that financial decisions about the project are the responsibility of the Contractor. Thus, enquiries which have financial implications, should be channelled through the Contractor. Such communications should be agreed between the Contractor and the Coordinator.

Please note that the Tempus Department cannot mediate in disputes between partners. These must be resolved within the project consortium.

7. DIFFERENCES BETWEEN PARTNERS - CONFLICT MANAGEMENT

People participating in JEPs come from different cultural backgrounds, speak different languages, use different working methods, employ different forms of communication and have different approaches to problem solving, accounting and management. Customs and sensitivities may differ between partner institutions. The challenge is to turn these differences into a programme asset, and take advantage of the strengths of each of the partners. Differences should be openly discussed. It is essential that partners are prepared to listen to, and learn from, each other. Be aware of the danger of misunderstanding particularly if the partners have only a superficial knowledge of each others' cultural background. To give an example, native English speakers often speak too fast or use too many colloquial expressions. On the other hand, a non-native English speaker may sound rude due to a choice

of words or an accent. There is sometimes a degree of defensiveness in ECE institutions, and open criticism is frequently not well received. On the other hand, a patronising attitude from the Western academics combined with lack of knowledge of ECE university tradition may prove infuriating. The coordinator should be prepared to mediate when problems arise.

A common misconception is the idea that benefits of a JEP should be restricted to ECE institutions. Although this may be true in a strictly financial sense, please remember that JEPs are collaborative programmes between individual academics and institutions. They are not one-sided-assistance, or charity-type aid. For collaboration to be effective, it must be beneficial to all. The Project Management Group needs to **maximise benefits for all participants**. In order to attract leading individuals, the project needs to be interesting from an academic point of view. JEPs benefit ECE partners through improvements to the infrastructure and retraining of staff. EU partners gain consulting/teaching experience. Participating academics on both sides could be formally awarded academic credits, such as Visiting Lecturerships/Professorships, Memberships of Societies etc. The coordinator should explore these possibilities with partners. Remember: every participating individual in EU and ECE will be devoting time to the project, which would otherwise be spent on other academic tasks. If the participants feel that the time spent on JEP activities is academically wasted, you are unlikely to get much cooperation from high-calibre individuals.

It is important to realise that the political and economic situation in the ECE countries is changing quickly. Universities face financial problems and uncertainties. JEP partners may be confronted with the effects of high inflation or unexpected delays caused by new legislation. Knowledge of the local situation is essential. Problems also arise if there is no strategic vision of future development in the ECE university, or no understanding of the JEP philosophy or mechanisms of EU funding.

This is particularly important when ECE university faces financial problems. It needs to be made clear that:

- a) JEP funds may be spent only on activities related to the JEP objective as defined in the JEP application and the Revised Budget and Activity Plan (RBAP, see below). They cannot be spent on other activities even if these are in need of funding.
- b) The JEP Contractor has the final decision on how the funds are spent.
- c) Part of the funds in the Structural JEP is usually spent on acquiring equipment for ECE institutions, while part must support collaborative activities. The funding cannot be used only to buy equipment.

Successful JEPs will affect everyday activities of the target institutions. By definition, JEPs are designed to restructure the system and will always meet a degree of reluctance to change. In extreme cases, the project could be interpreted as direct intervention by EU academics in the internal policy of the target institution. The Contractor should confront this factor early in the project, anticipate the reaction and make sure there are enough committed academics who support the JEP.

Handling conflicts. Conflict is a normal aspect of human interaction and can be used creatively to explore new ideas and approaches. It is almost inevitable that, at some point, problems will arise between the participating centres and individuals. **Clearly stated objectives, good communication and anticipation of problems** will help to avoid difficulties. It is useful to discuss all of the above at the beginning of the project, and to agree, within the Project Management Group, how conflicts will be handled and who will decide in difficult cases.

Problem handling checklist	
1	Anticipate problems. They will occur.
2	Do not lose your temper. The coordinator is there to keep things together.
3	Talk the problem through. Never walk away from an unsolved issue.
4	Differentiate between personal and professional. You are not there to make anyone else a better person. Both of you are there to help make the project a success.
5	Always ask the question: is this a real problem or a result of different backgrounds ?
6	Most problems occur as a result of inadequate communication.
7	If you need to be critical of somebody with a different cultural background, it is best to take local advice before acting.
8	Negotiate and compromise where possible. The art of negotiation is to solve the problem and not to show that your opponent is wrong.
9	Learn from conflicts. Help others learn from them.

8. JEP MANAGEMENT: GENERAL ISSUES

8.1. Management structure of the project

Academics are often attracted to a paperless, structureless, non-defined responsibility, type of organisational structure. However, JEPs involve a lot of money, a large number of people and have a strictly limited duration. Programmes of this type require an efficient management structure. Part of the structure is defined by the contract but a large part needs to be developed by the participants. Previous experience indicates, not surprisingly, that well managed JEPs are more effective.

8.2. Contractor

The JEP contractor is an institution which is legally and financially responsible for the money received. This institution nominates a contact person who is responsible for the actual management of the JEP. If the contractor and the coordinator are located in different institutions, it is

essential to define the responsibilities of each at the start of the programme. Usually the contractor controls the money and the coordinator directs academic activities. If the project is a failure, the coordinator's reputation might suffer, but it is the contractor who will actually pay for the mistakes.

Responsibilities of the contractor are:

- a) To administer the JEP grant.
- b) To draw the attention of all partners to contractual rules and to release money only for the purposes allowed by contract.
- c) To submit required reports to the ETF in cooperation with the coordinator.

8.3. Coordinator

The JEP coordinator is a key individual in the project. The coordinator's role needs to be clearly defined and agreed at the outset of the project. It is probably best if the coordinator becomes the Managing Director of the project. If the coordinator also represents the contractor, the final responsibility for the utilisation of funds is also his/hers. Responsibilities of the coordinator are to manage, coordinate and monitor the project activities with regard to timetable, assess achievement of the planned endpoints and coordinate appropriate records of activities. As mentioned above, the coordinator needs to actively cooperate with the contractor in the preparation of project reports.

Main coordinator challenges	
1	Adapt to local conditions.
2	Ensure institutional embedding.
3	Treat each activity in a strategic manner: ensure its long-term sustainability.

8.4. Project Management Group

Coordinator and contractor cannot manage the project alone. They need the Project Management Group which plays the role of the project 'Board of Directors'. This group should be formed as early as possible and should include individuals responsible for the project within each participating country, and, possibly, even within each participating institution.

Members of the Project Management Group should be formally appointed. The coordinator should ensure that the appropriate university authorities are notified of these appointments, so the individuals concerned receive recognition for the time they dedicate to the project.

JEP management is time consuming. The required time commitment should be discussed with a prospective member of the Project Management Group before appointment. If you wish to appoint a busy senior academic, ask him/her to nominate a deputy. Avoid appointing people who will be unable to devote enough time.

8.5. Support staff: JEP Administrator or Secretary

Time spent on JEP administration can adversely affect the coordinator's other academic activities. Thus, appropriate administrative support is essential. A project administrator or secretary appointed to support a JEP will take a lot of the administrative burden from the academic staff, and provide both continuity and a contact point for communication. Savings on administrative staff can be counter-productive.

At the beginning of the project:

1. Assess the needs for secretarial/administrative support in all participating centres. Usually, the Coordinator's office would need the highest level of support staff.
2. Consider including the following tasks in the administrator's job description:

- a) secretarial support;
 - b) transfer of funds and accounting;
 - c) organisation of meetings;
 - d) travel arrangements;
 - e) organisation and planning of visitors'/trainees' stay (accommodation, insurance etc.).
3. The JEP administrator or secretary needs to possess a range of skills, such as handling international communications, working in a multilingual environment, and possibly even handling accounts in different currencies. Prepare a job description and interview applicants to ensure that they are able to cope with the job. You may choose to employ a part time administrator and a part-time secretary instead of one full time individual.

8.6. Training of administrative staff

Consider training key member(s) of administrative personnel from ECE, for a short time period in the Coordinator's office to familiarise them with procedures and to establish informal links between administrative staff.

Key issues in JEP management	
1	Clear management structure and decision making.
2	Clear definition of tasks and responsibilities.
3	Named contact persons in every partner institution.
4	Defined communication channels.
5	Agreed rules for budget management and transfer of funds.

9. DOCUMENTS SUPPORTING PROJECT MANAGEMENT

9.1. The JEP Contract

The JEP Contract. This document tells you what you can and cannot do. It also defines the financial responsibility of the institution which signs the JEP contract (known as the Contractor). **READ EVERY WORD OF IT.** The Contractor is required to distribute copies of the contract to the partners. Ask the partners to read it from cover to cover and review it with key individuals from each of the participating institutions. Contact your Tempus Desk Officer if you have difficulties with interpretation of any part of the contract. Consult the contract before major financial decisions. Remember: reference to the contract may avoid lengthy disputes.

The contract includes **The Guidelines for the Utilisation of the Grant** which contain detailed information on how the funds may be spent. Consult the Guidelines during the project. Remember, if funds are spent on something considered ineligible, reimbursement will be requested. Always have the Guidelines available for key project staff and your administrator/secretary. Contact your Desk Officer if you have difficulties with interpretation of the Guidelines.

9.2. Your own project application

Your contract was awarded to achieve the objective defined in the Application. Keep the application for reference. After the award of the JEP grant, the work plan and budget described in the application will have to be updated and submitted yearly to the ETF, Tempus Department, as a Revised Budget and Activity Plan (see RBAP below).

9.3. Revised Budget and Activity Plan (RBAP)

Revised Budget and Activity Plan (RBAP) is an update and adjustment of your workplan as described in the original Project Application. It needs to take account of any changes in the local situation which have occurred between the time of preparation of the application and award of the grant. If the awarded grant is lower than the sum requested, it will

also need to accommodate the budgetary limitations. RBAP should be your realistic yearly work plan. You are required to prepare a first year RBAP within the first 2 months of the project. Once approved by the ETF, Tempus Department, your application, as modified by RBAP, becomes part of the contract. The contract and the RBAP are your main references for each year of the project. At the end of each year, your project will be assessed by comparing what you have done with what you had planned. The RBAP should be agreed by all project partners. If time allows, it is a good idea to finalise the RBAP at the first meeting of the Project Management Group. Make sure that all partner institutions have copies of both project application and RBAP. Use both for project review.

9.4. Annual/Final Report and Statement of Expenditure

You are obliged to send these to the ETF, Tempus Department, every year **by the date stated in your contract**. The Annual Report summarises project activities and finances in a given academic year. These reports are the main assessment tool for the ETF. In addition, they are also a useful reference for the project team and a record for future publications etc.. After completion of your project you are required to send a **Final Report**. Only after the approval of the Final Report by the ETF, should the financial matters be regarded as closed. In addition to the Annual Report, the contractor needs to submit a **Commitment Letter** to the ETF in the second and final project year. This confirms the willingness of the consortium to continue the project.

9.5. Miscellaneous documents

In addition to the documents discussed above it is useful to have the following for daily use:

- a) **Project master sheet** with an overall plan of activities, indication of the present status and future deadlines. This will save time during report preparation.
- b) **Finance master sheet** showing the present status of the project expenditure. One should be able to carry out

periodical projections of expenditure (monthly or before a major expenditure).

- c) **The mobility master sheet.** This should contain the names of mobility participants, dates of travel and the cumulative total of weeks of mobility used to enable the overall review of this part of the programme.

To save time on the preparation of annual reports, **the project documentation needs to be planned in advance.** Go carefully through the contract and the report forms enclosed with it, and identify the information needed for reporting. Avoid accumulating your notes on loose pieces of paper. Excellent software packages are available for the purpose of project monitoring and accounting. Please remember, the master sheets will only make sense if regularly updated. Updating can be a task of the project administrator/secretary.

Documents you need to submit to the ETF during the project year	
1	Revised Budget and Activity Plan.
2	Commitment Letter (second and subsequent years).
3	Annual/Final Report and Statement of Expenditure.
4	Individual Grantholder Reports.
5	Conventions (agreements) for all staff employed within the JEP (together with Annual/Final Report).

Documents to be kept by the contractor for audit purposes (send these to the ETF only if specifically requested)	
1	Receipts for all expenditure.
2	Sub-contracts.
3	Certificates of origin as well as the inventory numbers of the equipment purchased.
4	Travel tickets.

10. THE MANAGEMENT OF PROJECT ACTIVITIES

Every JEP activity will have the following components:

1. Objective
2. Planning
3. Executing
4. Monitoring
5. Documenting
6. Reporting
7. Informing.

10.1. Objective

Never start anything without defining an objective: otherwise it is likely to lead nowhere. Make sure that your objective is realistic.

10.2. Planning

Plan the content, budget, timing and outputs of anything you want to do. Assign responsibilities. Always assign a leader who understands and accepts responsibility. Always have a deputy project leader. Put your plan in writing and discuss it within the Project Management Group. **FIRST PLAN THEN ACT.** Clearly define your outputs (when will you say that the objective has been achieved?).

Whenever a number of people are recruited to participate in an activity requiring a long-standing commitment (e.g. preparation of teaching materials), it is useful to obtain written confirmation of the willingness to participate from individuals involved. Any participant in the programme should be aware of the timescale and deadlines before he/she accepts the task.

10.3. Executing

It is important to maintain the overall view of all the JEP activities, and to plan them so that they are all integrated to achieve the overall goal. Modifications to the original plan may become necessary during the project year. Please note that although the timing of the activities during the project year may be changed without approval, certain changes do need to be approved by the ETF before implementation. There is no need to contact your Desk Officer on minor matters. Consult the Contract and Guidelines for allowable budgetary changes.

To facilitate management, **Standard Operational Procedures (SOPs)** should be developed and documented for the repetitive activities such as:

- a) Transfer of money.
- b) Payments to mobility participants.
- c) Purchases of equipment.
- d) Meetings.
- e) Reporting and distribution of information.

Tips on management and efficient communication:

Follow agreed procedures and lines of management. Experience shows that mistakes and misunderstandings occur if partners have insufficient knowledge of the contract. For the smooth coordination of the project, it is also important to respect agreed lines of responsibility within project management. Once you decide who is the boss, let him/her do the job and try to do what you are asked to do.

Exchange of information. In multinational projects, the channels of communication are usually complicated. It is important not to choke the system with irrelevant information. In other words, do not send rubbish by fax. If you are asked to provide information, make an effort to provide **exactly** what is requested. If you cannot do this, explain briefly why you are sending something else. If you

are requested to send several documents (e.g. documentation required for the purchase of equipment), make every effort to send them as **one complete package** rather than fragmented in separate letters or faxes.

Be disciplined in financial matters. Financial information and documents required for JEPs are simple and well-defined. Spend time familiarising yourself with what is required and then provide **exactly** that. In financial management, a document that is “almost as it should be” is frequently worthless.

Finally, although accounting procedures and financial reporting differ between universities, partners must comply with the procedures requested by the contractor, who is legally responsible for the management of the project.

10.4. Monitoring

It is essential to continuously review the progress of the project. The monitoring system could be as follows:

- a) Medium-term progress should be monitored by the Project Management Group which should meet at six monthly intervals.
- b) Short-term planning and review should continue between the Project Management Group meetings. Maintain regular contact between the project coordinator and the leaders of different project activities.
- c) Coordinator’s visits. It is important that the coordinator carries out a monitoring visit to the participating centres and (if he/she is not based there), to all ECE institutions involved, at least once a year. Such a visit should be carefully planned and individuals whom the coordinator needs to meet should be notified in advance. A review of the project should be carried out with both local coordinators and relevant heads of departments. It is valuable for the coordinator to meet with university authorities on this occasion.

- d) The ETF monitors projects through the assessment of the RBAP, Annual/Final Report and also through visits. As part of the policy to decentralise the management of the Tempus programme, the National Offices will become gradually more involved in project monitoring. Coordinators are hence encouraged to supply information to the National Offices.

10.5. Documenting

Document daily activities. It is good practice to make a note of every completed activity such as an intensive course, monitoring visit etc. The coordinator should make a short note of key telephone conversations with project participants and decisions taken. Your decisions will have financial consequences: a record of these helps to avoid misunderstandings and problems later.

A record (minutes) of Project Management Group meetings should be kept, and these should be sent to all the participants for approval/comments as soon as possible after the meeting. Every individual appointed to a task within the project should be asked to write a short (no more than one page) report on his/her activities. Similarly, all visits should be summarised on completion.

It is a useful procedure for the coordinator to send, periodically, short summaries of project progress to the relevant administrative authorities in the participating institutions, particularly to the heads of departments involved. These should be objective reports containing both praise and criticisms. Please remember that an over optimistic report achieves little in the long-term. The most important duty of the project coordinator is to ensure that the project endpoints are achieved.

10.6. Reporting

Forms required for the Annual/Final report are provided in due time by ETF. Read them carefully at the beginning of the project to familiarise yourself with what will be required for the assessment of the project. Reporting need not be a time consuming process if the activities are recorded throughout the project. On the other hand,

inefficient recording of progress wastes the coordinator's time at the end of the project year. The Project Management Group should have a clear policy that all partners will send the coordinator a short report on each activity immediately after its completion and a fuller progress report at the end of the project year. Such short reports should include basic data on the activity, participants, outcomes, and expenditure. Distribution of a questionnaire at the end of the project year can help in the preparation of the report.

The contractor needs to send the project report to the ETF annually. In addition, each ECE country institution needs to send an Individual Institutional Report annually to the National Tempus Office. All these reports are assessed by the ETF.

Main points of JEP assessment	
1	Has the project objective been reached ?
2	Have the project activities formed a coherent entity leading towards achievement of the objective ?
3	Has the money been spent according to contractual rules ?

10.7. Informing

Communication and a clear decision making process are essential for any organisation. They acquire additional importance (and admittedly another level of difficulty) when geographical distance is involved. Inadequate communication or what is aptly called "mushroom management style" (keep them in the dark and feed them rubbish) may cause major problems.

The coordinator and the Project Management Group must remain in regular contact. Regular weekly telephone calls at a set time are an effective way of monitoring the project.

Project participants database needs to be set up at each partner institution and should include phone, fax and E-mail numbers. Key individuals should designate deputies. Holiday schedules should be exchanged.

Overhead costs of the project provide for costs of communication. Make sure that each partner institution has funds to support unrestricted communication. The high cost of communication is a myth. What you will spend on phone and fax bills is a small proportion of your grant money. The cost of ineffective communication is usually much higher. Make sure this is clear to all partners and to administrators who grumble about your phone or fax usage. **DO NOT SAVE ON COMMUNICATION.**

10.7.1. Internal communication: informing your own team

- **Answering letters, faxes and returning telephone calls.** It is essential that all the participants agree that every communication will be replied to as soon as possible. Nothing delays projects more than a lack of response to correspondence. If your answer needs time, fax a short note informing of the delay.
- **Distribution of information within the team.** Distribute new information regularly to all key personnel. It should be a task of the project administrator to ensure that information is adequately disseminated.
- **Project meetings.** Meetings are the best opportunities for disseminating information and resolving difficulties and conflicts. Prepare an agenda (points to discuss) for each meeting and distribute it in advance making sure to give individuals adequate warning of meeting dates. A reply form sent with an invitation helps to arrange hotels, catering etc. The following are recommended during the project year:
 - **Planning meetings** at the beginning of the project year. The contractor and coordinator should prepare a proposal for the RBAP, an overview on the mobility flows and handouts on the most important contractual rules relevant to the JEP. Partners from the ECE country(ies) need to prepare a proposal for the planned mobility flows.
 - **Monitoring meetings** should include project overview, JEP objectives, the roles of partners, a review of the work to date on a partner by partner basis, or on the basis of different categories of activities and a review of the budget should take place.

10.7.2. External communication: telling other people about the project

The dissemination of information about the JEP will enhance its impact. The project team should do this at several levels:

- a) Departmental
- b) Faculty
- c) University
- d) National and international (professional conferences, contact with national and international organisations).

Local dissemination of information is as important as national and international presentations. All too often several international programmes are run within one institution with little communication between the relevant teams. Maximally use newsletters, notice boards etc. Encourage your team to publish their experiences in professional journals, particularly in ECE countries. There should be a calendar of meetings and a forward plan of the information activities so that the deadlines for presentations, abstracts etc. are not missed.

11. ENSURING THE LONG-TERM EFFECT OF THE JEP

JEP is worthwhile only if its effects persist beyond the Tempus funding. The project team needs to hold long-term view throughout the project. Long-term planning should start at the beginning of the project. Each project activity should be continuously assessed with respect to its long-term effect and prospects for long-term funding. Often it is unlikely that the universities in the ECE countries will be able to completely take over the funding of the Tempus project. Inevitably some other source of external funds will be required. Establishing funding takes time. Start thinking of long-term funding as soon as first results are achieved. Show the results to the prospective sponsors.

Maintaining and developing contacts initiated by JEP	
1	Partnership agreements at university, faculty or departmental level.
2	Contacts through international associations.
3	External funding through chambers of commerce, town halls, regional authorities etc.
4	Funding through cooperation with industry.
5	Limited follow-up funding through the Joint European Network (JEN).

Critical mass. The concept of critical mass is that the single individual has much less chance of maintaining and developing the project or to change the system than a group of people who understand each other's goals, aims and working methods. Plan the staff exchange with the achievement of a critical mass in mind. Any activity requiring specific skill is shaky if it depends on one person. Also, make sure that a sufficient number of people are trained to use new equipment, software, etc.

Another factor to be taken into account is the level of seniority of individuals who are going to carry on JEP activities beyond the funding period. To secure institutional embedding train people at different levels of seniority. The concept of "training the trainers" is important. All the above emphasise the necessity for a careful selection of personnel for training abroad. The main selection criterion should be the individual's future potential impact on the system and his/her ability to train other people.

Joint European Network (JEN). At the end of the JEP, JEP consortia can apply for a two year limited funding to maintain and disseminate the results of the JEP in the academic community of the ECE country. JENs provide support for the transition period between JEP funding and the institution's own funding. Similar to JEPs, JENs need strategic planning. The coordinator needs to remind the JEN participants that if the programme is to continue, local funding has to be found before the end of a project.

12. MOBILITY

Development of human resources through staff and student exchange (mobility programmes) is an important part of JEPs. The amount of money allocated to staff retraining and teaching usually constitutes a substantial part of the JEP budget. JEPs may include staff mobility and student mobility.

12.1. Staff mobility

JEPs fund the mobility of university staff (academic or administrative) which includes teaching/training assignments, retraining and updating periods, short visits and practical placements.

Trained staff probably provide the best guarantee of long-term change to the system. Investment in staff exchange should strategically yield the best "value for money". Sometimes, the proportion of money allocated to mobility may seem excessive. However cooperative programmes work much better if they are based on a network of personal contacts. Otherwise, the contacts tend to be formal and the work less efficient. The necessity for travel in the formative period of international network, is of course quite different from an aimless travelling known as "academic tourism". The Project Management Group needs to periodically review the staff exchange programmes and assess whether potential benefits to the project justify the travel.

Mobility planning. Long-term effects of mobility depend on the right choice of participants. Choose the wrong people and the money invested in staff exchange will be wasted. To tailor the JEP training programme to the institutional needs, it is essential to carefully discuss the future type and numbers of trained staff required in the ECE institution. All too often the selection of candidates is haphazard. Discuss this at the beginning of the project before the mobility programme starts. The following factors are important:

- a) Critical mass. Plan how many individuals trained abroad will be needed to ensure the lasting effect of the programme at the target institution.
- b) Institutional strategy. Establish whether the department sending staff for retraining has a strategy for the use of acquired expertise. Is it prepared to promote/ give authority to trained personnel so that their new skills can be maximally utilised ?

Is the head of department supporting these aims ? Is the university prepared to fully exploit new skills and facilitate sharing them with other departments ? Is there a database of retraining programmes held at the faculty/university level ? If the answer to most of the above questions is “no” perhaps the start of the mobility programme needs to be delayed while these problems are addressed.

Discuss the above questions with the relevant departmental/ faculty authorities. Regular meetings of the Project Management Group with these authorities are essential.

Selection of candidates for training. It is recommended that a formal selection procedure is established at the home university. When selecting individuals for a retraining programme take the following into account:

- a) Motivation to learn: is the candidate genuinely interested in learning new skills ? Does he/she know what he/she wants to learn ?
- b) Career plans: does the candidate have a long-term aim and a plan of how to achieve it ? Is the candidate going to apply what he/she learned within the target institution or does he/she plan to move elsewhere ?
- c) Immediate usefulness of the trained candidate to the project. It is a good idea to retrain individuals with the greatest potential at the beginning of the project and immediately involve them in the project activities.
- d) The level of language proficiency. Language preparation is an underestimated part of JEPs. There is a big difference between being able to get by in a

foreign language and being able to participate in, for example, professional discussions abroad. A lot of what is perceived as a patronising attitude from the Western universities stems from a communication block. This is not to discourage anybody, but to say that candidates should be strongly encouraged in intensive language revision/training.

Linguistic backup at ECE and EU universities. Most universities do have a language department. The JEP coordinator should visit such a department to discuss the JEP and its implications for linguistic training. Often the intensity and/or the level of courses are not appropriate to the requirements of intensive staff exchange. There are two ways to tackle this problem. One is to stimulate the university to expand existing courses, the other to provide some JEP funding for linguistic preparation. ECE universities should support advanced language training. Make sure that the prospective JEP participants are aware of potential language difficulties and that they use the facilities for improving the linguistic ability, both at home and, if possible, at the EU university. Provide visiting fellows with information about the opportunities for on-going language training at the host institution.

Staff training programmes in the EU institutions. The ability to efficiently train visiting fellows is a complex skill. The coordinator should not take it for granted that the EU institution is able to provide a structured training programme. It is all too easy, in a busy department, to leave visiting fellows to look after themselves. Discuss the following with your project leader and his head of department before commencement of the programme:

Is there an existing training programme in the host department? Is it documented? Is there a written timetable? What is the departmental track record? How many people were trained last year? Which staff members are responsible for training? Confirm with the head of department how much time the departmental staff will be able to spend with JEP trainees. Does the head of department support the training programme? Are there plans to involve visiting fellows in the mainstream of the institution's work (this may involve applications for work permits/professional registration etc.)?

Performance monitoring. Monitoring of the visiting fellows performance and indeed the adequacy of re-training is necessary. It is essential to assign individual supervisors in the host department who would review the progress of trainees.

Teaching visits/visiting lecturers. Short-term teaching visits of EU academics to a ECE institution play an important role in the transfer of skills and international team-building. To maximise their impact they need to be planned with care. Consider the following:

- a) Time available: make sure the lecturer is prepared to spend enough time in the target institution.
- b) The usefulness of a lecturer's expertise to the target institution. Will he/she be able to teach exactly what is needed ?
- c) Exposure of junior members of staff. It is important that all grades of staff benefit from teaching visits. It is unwise to limit the contact of visiting lecturers to senior staff. Provide time for meeting junior staff, research students etc. It is particularly important that candidates for mobility are involved.
- d) Can the lecturer's expertise be used beyond a departmental level? Organise a faculty lecture? Organise discussion? Invite students? Invite other individuals interested in international collaboration ?
- e) Prepare a programme of teaching visits and notify the lecturer in advance. It is essential that the lecturer knows exactly the form, titles and duration of his presentations, and what audience to target.
- f) Prepare the audience. Who in your institution will be interested in meeting this lecturer? Notify appropriate people in advance. Advertise widely. The image of your institution depends on how efficiently you can manage visits. An unstructured visit projects your department as being poorly managed.
- g) Please remember that to come to your institution the visiting lecturer has sacrificed time which would

otherwise have been spent on research. You want him/her to feel that this time has not been academically wasted. Recognise this. Are there any academic credits, or other recognition, the institution can offer? Make sure that you know the lecturer's research interests. Is there anybody in your institution whom he/she could meet?

Do not overload the programme. Define the objective of the visit and plan realistically. Make sure that the programme allows time for informal discussions. If you invite busy academics who may sometimes have to travel long distances, plan for rest time and allow visitors some "space" to think and work alone. It is important to arrange focused meetings at which decisions can be made.

Practical aspects of staff exchange

Starting the staff exchange. Heads of departments in all host centres need to be fully aware of the requirements, timetable and staff commitments required for the re-training programme. Organise a departmental meeting before the JEP starts, in order to explain the aims and objectives of staff exchange to the academic and supporting staff.

Correspondence with prospective participants. Send the programme of activities to the prospective participant and also to his/her superior, so that the programme can be discussed and agreed before the person joins the university abroad.

The appendix shows an example of a letter sent to the prospective participant of mobility. It is extremely important to clarify the arrangements regarding medical insurance.

In order to avoid misunderstandings, it is essential to emphasise that the sum of money payable to them may vary according to fluctuations in international exchange rates. Always let the grant recipient know the name of the person he/she should contact for explanations concerning financial issues.

The need for a report from the Individual Mobility Grantholder should be included in the initial letter to the prospective fellow. It is important that the reports are completed before the fellow leaves the host University.

Remember that the visiting fellows might need introductory letters from the project coordinator to the bank, the university library etc.

Staff mobility. Essential issues	
1	What is the function of the staff mobility in the context of the JEP objective ? How does it relate to the needs of the institution ?
2	What is the intended output of mobility ?
3	Is there an institutional policy on the optimal use of mobility grants and external teaching staff ?

Staff mobility. Planning and preparation of staff teaching visits	
1	Define the main focus and content of the programme. What do you want to achieve by this visit ?
2	Define the target group. Who would be interested in listening to the visitor ?
3	Define the language of presentation and discussion (check audience proficiency level). Are supporting materials/notes/translators required ?
4	Prepare a detailed programme of the visit and distribute it to interested staff members. Do not overload the programme.
5	Check technical details: place, state of audio-visual equipment etc.

12.2. Student mobility

Student mobility, could be organised as part of a Structural JEP, or it may itself constitute a Mobility JEP. Student mobility can include study periods, practical placements and participation in short, intensive courses.

Academic recognition. The study period abroad is a valuable experience for students. However, the optimal impact of mobility occurs when academic recognition is

achieved. Discuss at the beginning of the programme, what level of academic recognition can be achieved. Ideally, the period of study abroad should be integrated into the home university's curriculum. Clarify the procedures related to academic recognition with the relevant academic authorities, i.e. dean, academic senate, or national higher education authorities. Whenever possible, partners should consider using the procedures established by the European Community Course Credit Transfer System (ECTS).

European Community Course Credit Transfer System (ECTS) The ECTS is now being piloted throughout EU in chosen disciplines, but it does not, at present, include the ECE countries. However, wherever a JEP includes student mobility, it may be important to acquire the appropriate information on ECTS, and train the member of academic/administrative staff in general issues of academic recognition. It is essential that the JEP partners agree on the methods of crediting the students participating in the mobility.

Internationalisation of study programmes. Internationalisation of study programmes involves the development of student exchange and courses or complete curricula offered in a foreign language. The concept is attractive to many universities because of the potential for income generation from the intake of foreign students. The Coordinator should establish whether internationalisation is a part of the planned institutional development and, if so, how JEP activities may contribute to this.

If internationalisation is a part of the institutional policy, the language used for teaching materials which may be developed in the course of JEP should be discussed. It could be that, for example, development of teaching materials in English is preferred.

Planning the student mobility. It is essential that the host and home institutions agree on the programme of study abroad. In addition, the host institution should develop the logistical backup of the programme. Student supervisors should be selected and full information on the courses provided in advance to prospective candidates.

Incorporating student mobility into the overall JEP programme. A model for student mobility could combine the student and staff mobility. In this way, some supervision/tutoring could be provided abroad by the staff from the home institution.

Practical placements for university students. The aim of practical placements is to offer on-site training within enterprises. It is important that planning involves both the enterprise and the home institution. Selection criteria and procedure are important in planning the placements. Consider the following:

- a) Will the practical placement develop personal and professional skills for the participants ?
- b) What is the intended impact/output of the practical placement on the home institution? What is its function in the structural development of the department/university ?

Preparation for study abroad. The benefits of the period of study abroad depend on the level of preparation. It is essential that students are informed, well in advance, of the requirements for the period abroad, both in academic terms (e.g. preparatory reading, comparison of courses, the attendance of special seminars/courses before the study period) and cultural terms. Information on linguistic requirements is essential.

Infrastructure. There should be a person in the host department who has specific responsibility for logistical issues, such as finding accommodation and organising the first or introductory period.

Methods of assessment of student mobility. The student's work abroad needs to be assessed by both the host and the home institutions. They need to agree on the details of assessments/examinations. Students need to be well informed about assessment procedures. The results achieved during the period abroad should be assessed either through examinations at the host university or by the supervisor at the home university. Students also have to prepare the Individual Grantholder's Report.

Costs of student mobility. The host university can claim institutional costs to cover the costs of receiving students from abroad. Please refer to Guidelines for the Utilisation of the Grant for details.

Student mobility. Essential issues.	
1	What are the training/study goals ?
2	What are selection criteria for candidates ?
3	What preparation is required by the candidates (reading, advance details on curricula, necessary background knowledge etc.)
4	Is there academic recognition and credit transfer ?

12.3. Practical arrangements for staff and student mobility

Making visitors comfortable. Assign a person in the department to be responsible for the administrative matters related to visitors. Provide visitors on arrival with a package containing:

- a) Information on the available accommodation and its prices.
- b) Local Town/University plan.
- c) Suggestions as to meal arrangements. Nearest shops.
- d) Location of banks.
- e) Location of the library.

Travel. It is useful to identify a single travel agent who will handle all the travel within the programme. Leading travel agencies can arrange the international distribution of tickets. Please remember that cheap Apex tickets need to be booked 14-28 days in advance and that including a Saturday night in the timetable of the visit usually saves a lot of money.

Visas. The formalities might take several months to complete and should be commenced well in advance. Registration with the local police is sometimes required.

Work permit/registration with professional bodies. Work permits and registration certificates take a long time to arrange and require specific documentation. It is, therefore, essential for applications to be submitted early.

Medical insurance. The regulations for medical insurance of academic staff and/or for students vary in different European countries. Make sure that all project participants are adequately covered, both when working and when travelling abroad. Normally, you cannot arrange travel insurance for journeys which commence in another country. Thus, if tickets are arranged through the coordinators office in EU, the ECE participants will still have to arrange their own insurance

Accommodation. Early planning is essential, particularly for the student mobility. Establish whether the host institution has an office dealing with student/visiting staff accommodation. Check the availability of accommodation and its price. For longer term visitors it is a good idea to arrange accommodation at the university for an initial week or two, and to let the visitor make his/her own arrangements afterwards. Always inform the visitors of the price of accommodation in advance. During the academic year, university campus accommodation may be in short supply. Make your arrangements early.

Payment methods during the stay abroad. Students and staff have to be reliably informed on the financial conditions and constraints before the period abroad starts. Establish whether an immediate payment on arrival is required, and, if necessary, arrange this with your Finance Office. It is a good idea to arrange a small cash payment on arrival to give the visitor the opportunity to open a bank account. It is also a good policy to pay subsistence allowances on a monthly basis. Avoid paying the grant in one instalment. To avoid problems at a later stage, payment procedures should be discussed and agreed on by the partners at the beginning of the project period.

Database of institutions participating in the student mobility network. Develop and regularly update the database which should contain the following:	
1	Basic information on the participating institutions.
2	Details of the relevant curricula.
3	Time schedule of the academic year.
4	General and language requirements for the enrolment of foreign students.
5	Information on accommodation in the host institution.
6	Information regarding visa and registrations with the police.
7	Information on health insurance.

13. FINANCIAL MANAGEMENT

13.1. Financial monitoring system for the project coordinator and contractor

The coordinator and contractor need to have an up to date view of the project finances and be able to carry out projections of expenditure. Monitoring JEP finances will be much less complex if a financial monitoring system is devised before expenditure starts. This should consist of a master database along with standard expenditure forms (see appendix). Such forms introduce an accounting discipline and save a lot of time during the reporting periods.

In the design of forms it is important that the budget headings correspond to these in your JEP contract and in the Annual/Final Report form. Check with your Finance Office whether appropriate accounting codes/headings can be assigned to your account so that the university computer printout matches your budget headings.

13.2. General rules

Read carefully your Guidelines for the Utilisation of the Grant. These will give you a complete picture as to what you can and cannot do. Pay particular attention to contractual limitations such as:

1. Minimum sum to spend on equipment.

2. Limitations on transfer of funds between budgetary headings.
3. Upper limit for staff costs and overheads.
4. Total amount to be spent on mobility.

Please note that your university may be asked to return the money if you spend it on items which are ineligible. If in doubt talk to your Desk Officer. Keep a record of your conversation/ correspondence.

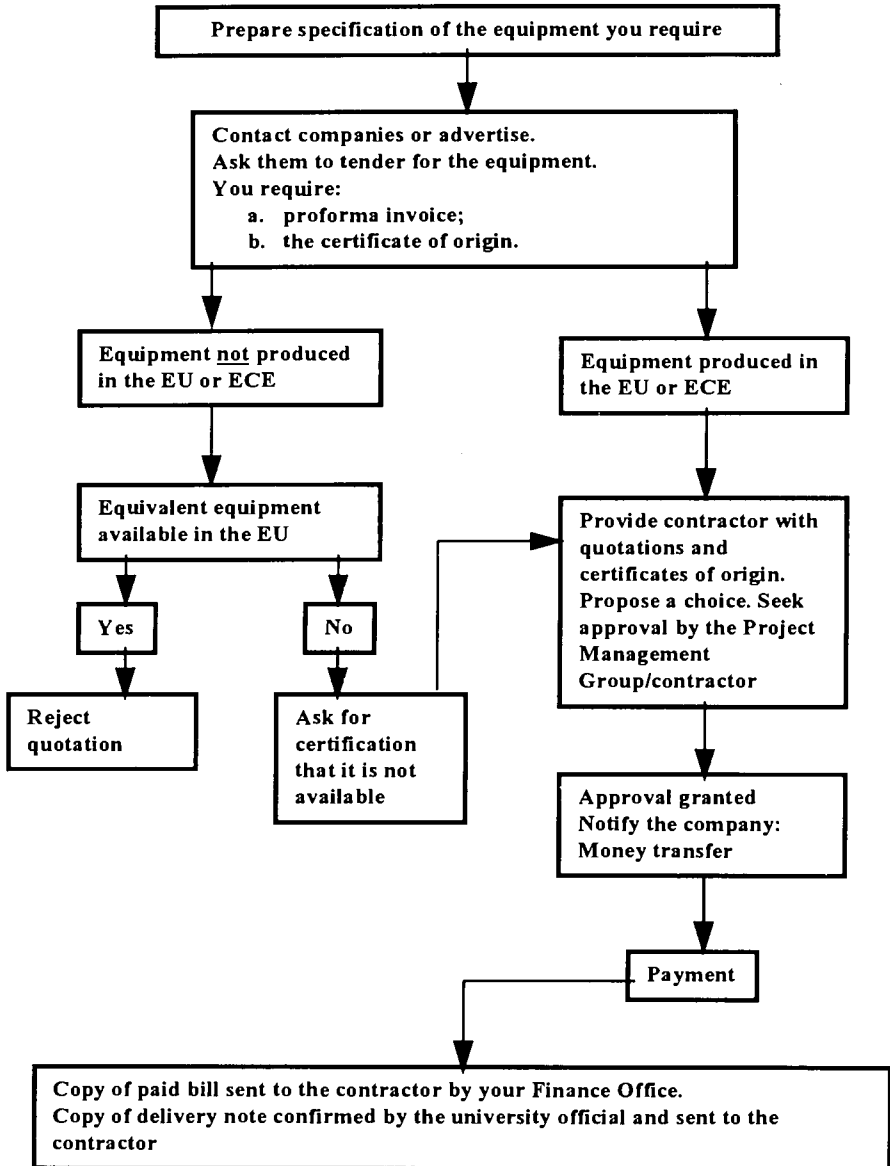
13.3. Equipment

Equipment is a tool to achieve the project objective: buying equipment is one of the aspects of the project and is not necessarily the most important one. A large JEP has considerable buying power. Remember this in negotiations with the equipment suppliers. There is normally a good chance to negotiate discounts. Some firms in ECE countries quote their prices in hard currency but you can insist on negotiating in local currency. Prospective suppliers should provide a written quotation (pro-forma invoice). To safeguard the supplier against exchange rate changes, such a pro-forma may have limited validity (e.g. 21 days).

Remember that only equipment originating in the EU Member States or the ECE countries may be purchased from the Tempus grant. By "originating", it is meant equipment manufactured in the EU or ECE countries. Exceptions can only be made to the rule if no equivalent is available in the EU or ECE countries. Equivalence is considered from a performance point of view, price and availability of maintenance services in the ECE country concerned. Exceptions to the rule must be approved in writing by the ETF. In the case of books and software (of an origin other than EU or ECE countries) one may consider that the "no equivalent" argument is fulfilled so there is no need for contractors to write about this.

Please note that your grant does not pay for taxes, custom duties etc. Contact the local university Finance Office and if necessary the National Tempus Office for advice.

Recommended procedure for the purchase of equipment



13.3.1. Communications and documentation related to the equipment purchase

Proper documentation of equipment purchase is particularly important in view of the large sums of money involved and the contractual rules and limitations. Poor communication between ECE universities which intend to buy the equipment, and the contractor, frequently causes delays. Please remember, that the contract requires the purchase of equipment within a specified academic year. The following is recommended:

1. At the beginning of the purchasing procedure, read the contract and familiarise yourself with the rules to avoid making mistakes which could be expensive.

Prepare fully-detailed specifications of the equipment you require. Contact companies and invite them to tender for the equipment. Interested companies will respond by providing appropriate proforma invoices (see below).

2. Send the contractor the relevant documents. The requirements are simple, but you must send exactly what is required:
 - a. Proforma invoices from the companies who want to sell the equipment. These must state the **type** of equipment, the **quantity**, the **price**, the **delivery** details and the **payment** details.
 - b. Certificate of origin, prepared by the company, which should state the country where the equipment has been manufactured.
 - c. Your recommendation as to the choice of supplier.

A MINIMUM OF THREE DIFFERENT COMPANIES MUST SUBMIT SETS OF PROFORMA INVOICES/ CERTIFICATES OF ORIGIN FOR MAJOR PURCHASES. To simplify comparisons, ask the manufacturers to provide quotations in the local currency or in the currency specified by the contractor.

3. Once the equipment has been bought and delivered you must send the contractor documents to prove that:
 - a. the money has been paid out.
 - b. the equipment has been delivered.

Therefore, you must provide:

- a. An invoice from the manufacturer of the equipment with the word PAID written on it and signed by the supplier.
- b. A delivery note from the supplier listing the equipment as delivered and signed by the university official (or local project coordinator) stating that the equipment has been received.

Please remember, that incomplete documentation is worthless. A proforma invoice alone is not proof of purchase. Purchase of equipment requires discipline. **Send only the documents described above.**

Finally, make sure that the purchased equipment is put on the inventory of the university, and make note of relevant reference numbers.

13.3.2. Definitions

Proforma invoice: A document describing the price of equipment a supplier offers to sell you. It should contain:

- a. A detailed specification of the equipment.
- b. Prices for a specified number of items. Do not accept general statements such as 'a discount will be offered for larger amounts'. Instead, ask the company to provide you with separate quotations for, say, 5 and 10 items. Specify the currency for the quotation. Do not accept quotations from different sources quoting prices in different currencies. This will only complicate the procedure.
- c. Delivery time and mode of payment.

Invoice: In simple terms, an invoice is a bill. A document requesting payment or pre-payment for ordered equipment. For accounting purposes, it is important that the word "PAID" is inserted on the invoice when payment has been received. This needs to be signed by an official from the supplying company.

Delivery note. A document stating that the equipment has been delivered to the university which placed the order. This needs to be signed by a person authorised by the university to do so.

Inviting tenders from companies. You can either approach selected individual companies which produce what you require, and ask them to provide proforma invoices. Alternatively, you might invite any company to compete to supply you the specified goods. This process is called "An invitation to tender":

Instead of asking for the specific item of equipment, prepare a detailed description (specification) of what you require. In case of laboratory equipment, describe the following:

1. The kind of equipment you need (a microscope, a spectrophotometer, an ultracentrifuge).
2. What do you want to use it for (e.g. range of analyses to be performed).
3. Analytical performance required (e.g. the precision of analysis).
4. Type and size of samples of material you plan to analyse (milligrams, micrograms, nanograms, etc.).
5. Any potential risks associated with samples to be analysed and safety features required (e.g. infectious samples, radioactive material, etc.). Safety standards.
6. Reagents and disposables required. Cost of day-to-day running of the equipment.
7. The level of data management required.

8. Service and maintenance requirements. If the equipment breaks down, how quickly would you require the repair to be completed (hours ?, days ?).

Prepare the specification, and send it to companies you think will be interested. For large purchases, it is an accepted procedure to place a formal advertisement in the appropriate commercial journal. Normally, companies will respond by sending detailed proforma invoices for equipment they think will satisfy your requirements.

13.4. Academic fees

Providing a fee is a helpful inducement, particularly when the project objectives require completion of a task as a matter of priority. Setting the level of academic fees can be difficult. Clearly, the Tempus programme cannot provide for academic fees equal to commercial consultative rates. It is also worth considering that the size of the academic fee should, at least to some extent, be proportional to salary levels in ECE and EU countries. In any case, the maximum percentage for academic task costs should be respected.

13.5. Travel and subsistence within the organisational grant

Travel and subsistence costs under the organisational grant - other costs are intended to cover flows within the EU or within one country (EU Member State or ECE country).

Travel costs should be paid on the basis of the actual costs, subject to the upper limits specified in the contract (for plane travel a normal economy air fare, by train a first-class train fare and by car the first-class rail fare equivalent to the distance covered).

For subsistence, the amounts indicated in the contract are an absolute *maxima* for visits within the organisational grant whereas the mobility grant (see below 13.6.) the amounts are just indicative. For durations not included in the table, the grant should be calculated proportionally (see below 13.7.).

13.6. Travel and subsistence under the mobility grant

Travel and subsistence costs within the mobility grant (for staff and student mobility) are intended to cover flows between two different countries in directions from West-East, East-West or East-East.

Under student mobility, the contract table shows the *indicative amounts* for students grants including *all* possible costs, i.e. subsistence, travel and institutional costs (only in the case of study periods).

For staff mobility, the contract table gives the *indicative amounts for subsistence*. For travel expenses, the same rule applies as for the organisational grant: actual costs subject to a maxima.

The fact that both staff and student mobility tables are just indicative means that the contractor has the flexibility to allocate different sums to individual flows always respecting the total lump sum awarded for a specific category, i.e. student or staff mobility. Consequently, the sums actually allocated to individual flows may not always correspond to the sums indicated in the tables and amounts from one flow to another of the same category and duration may vary (for example depending on the destination, the travel costs, etc.).

Although the total amount allocated for each mobility category should be respected, this amount can be flexible but only up to 5%. This means that the total sum for each of the two mobility categories may be increased by 5% (for example by transferring funds from the organisational grant) without prior authorisation.

On the contrary, if the resulting total sum is lower than the sum awarded in the contract, the excess may be used to finance further mobility flows or may be transferred to the organisational grant.

For durations not specified in the table, the grant should be calculated proportionally (see point 13.7 below).

The recalculation of the staff and student flow should be done by the project team on the basis of the actual situation

and should then be presented in the Revised Budget and Activity Plan that should be sent to Turin by the 31st October of each year.

In any case, payment rates have to be discussed with the prospective candidates. A mistake when stating the amount to be paid could result in prolonged disputes later.

13.7. Mobility. Calculating upper limits of subsistence allowance

Tables included in the Guidelines for the Utilisation of the Grant show the amount (whether maxima or indicative) of mobility allowance for a number of time periods. To calculate new amounts for durations other than those given in the tables, take the shorter duration as a baseline and add an appropriate proportion of a difference between the longer and shorter period allowance.

For example, the tables indicate 4 and 8 weeks allowances. To calculate an amount for a 5 week period, take the amount for 4 weeks (the lower duration) and add $\frac{1}{4}$ of the difference between the allowances for 8 and 4 weeks. Using the staff mobility table of the contract this will be:

$$\text{ECU } 1,600 + \frac{1}{4} (2,400 - 1,600) = \text{ECU } 1,800$$

13.8. How to carry over funds from one academic year to the next. Reporting activities which overlap two academic years

Within the present contract it is possible to carry over unspent money from one academic year to the next within the contract period. E.g., if due to organisational difficulties a number of student flows were to be postponed from the academic year 1994/95 to 1995/96, the money allocated for these flows should be indicated in the RBAP for 1995/96 as unspent in 1994/95, but the total sum planned for student mobility for 1995/96 will need to be appropriately increased. Please note that some activities, such as equipment purchases, cannot be delayed. To ensure the availability of equipment for the project, the yearly minimum allocated for equipment purchases should be strictly adhered to.

The present contracts also enable the overlapping of activities over two academic years within the contract period. Such activities should be reported in the Annual/Final Report for the year in which the activity was **completed** and paid for. If activities are not completed (or paid for) before the 31 August in any given year they should not be included in the Annual Report. Sums of money related to such activities should be indicated as 'unspent'. It is unacceptable to report expenditures which are not supported by invoices. If e.g. due to problems with visas, students who were supposed to follow a course at an EU university in 1994/95, were to miss the start of the first term, it could still be possible for them to follow courses starting in the second term and continue their stay into the following academic year. However, these flows should not be reported in the Annual Report for 1994/95, but in the Annual Report for 1995/96. The total amount used for these mobility flows should be indicated as unspent in the Statement of Expenditure 1994/95 and should be included in the RBAP for 1995/96.

14. RUNNING THE PROJECT: WHAT TO DO FIRST

The first phase of the project is normally the most difficult. Before the activities start ensure the following:

14.1. Confirm the workplan

Prepare and submit the Revised Budget and Activity Plan (RBAP). The contractor needs to present the RBAP to the ETF every year by the 31st October. After signing a JEP contract the contractor will receive 50% of the total grant for the first year. The allocation of the remaining 50% depends on the approval of the RBAP by the ETF.

Checklist for the final workplan (RBAP))	
1	Is the objective stated in the contract correct ?
2	Has the situation in the partner institutions changed since the JEP application ?
3	Have the outputs been accepted by all the partners ?
4	Is there enough money to carry out all planned activities ? If not, what should be modified ?

14.2. Confirm the management structure

As stated above, a well-defined management structure is essential for the project. Please refer to the following table.

Management structure checklist	
1	Who is the overall Project Manager ? If it is not the coordinator, who will make the final decisions ? What is the decision making procedure ?
2	If the contractor and the coordinator are based in different institutions has the decision making process been established ? Who represents the contractor ?
3	Is there a project leader in each participating institution ?
4	Is there a deputy for every key person ?
5	Has the management structure been accepted by all the partners ?
6	Has the responsibility for project activities been assigned to individuals ?
7	Are procedures for monitoring and reporting in place ?

14.3. Establish procedures for money transfer

Establish contact with the Finance Officer(s) of the partner institutions. Ask for the names of individuals responsible for JEP account and meet them at the earliest opportunity. Include them in your project participants database. Make sure you can easily contact them.

Open the accounts. Ask the Finance Officers in partner universities to open appropriate JEP accounts and notify you of the details.

Design standard procedures. Design standard transfer forms for use in communications with your Finance Office and adopt standard procedure for managing transfers. Possible procedures could involve (see appendix for an example of relevant letters):

- a) A "Request for Transfer" form sent to the contractor's Finance Office.
- b) A "Notification of Transfer" form including a disposition note faxed to the Finance Officer in the ECE

institution with a copy faxed to the local Project Leader.

- c) It is useful to request a written undertaking from each of the partner universities' Finance Offices, that the transferred funds will only be spent on authorisation of the local Project Leader (see appendix).

Learn how the money travels: ask which banks are involved and get as many names of persons responsible for the account as possible. This saves a lot of time and trouble in tracing your money if problems occur. **Test the transfer system** before you transfer a large amount of money: the first transfer should be small to minimise risk.

15. SYNOPSIS OF JEP DOCUMENTATION AND CONTRACTUAL RULES

JEP documentation defines the rules for its management. The importance of JEP documents is hierarchical. The hierarchy is as follows:

1. Special conditions of the Contract.
2. Revised Budget and Activity Plan.
3. Guidelines for the Utilisation of the Grant.
4. General conditions of the Contract.
5. Guide for Applicants.

Legal responsibility. The institution legally responsible to the ETF, is the contractor.

Limited funding period. The funding period of any Tempus JEP is strictly limited and stated in the contract. You cannot spend money on anything out with the contract period.

Required reports

1. At the beginning of project year 1, provide the ETF with a RBAP for the first year by 31st October.

2. By the end of the first and second year (31st August) of the project, the contracting institution is required to provide a Commitment Letter stating its wish to continue the project.
3. Each project year the following require to be submitted by 31st October
 - a) Annual Report and Statement of Expenditure
 - b) Individual Grantholder Reports
 - c) Revised Budget and Activity Plan for the next academic year.
4. At the completion of the project, the Final Report and Statement of Expenditure including Individual Grantholder Reports requires to be submitted by 31 October.

Records you need to keep. The list of documents which you need to keep for five years is enclosed in the Guidelines for the Utilisation of the Grant.

Copyright. Any copyright regarding the materials created during the grant period belongs to the contracting institution. In any document the support of the EU through the Tempus scheme has to be clearly acknowledged.

Insurance. The ETF is not responsible for accidents, illnesses, etc. The contractor must draw the attention of all the partners to this.

Operating the Tempus account.

- 1) You cannot withdraw cash from this account.
- 2) You should keep JEP money in either ECU or convertible currency. If there is a need to deal in non-convertible currencies, only convert the money as and when necessary.

Interest on JEP account. Remember to spend all of your accumulated interest by the end of the contract period. Notify your institution about this so that the Finance Office

or the bank can let you know what interest has accrued in plenty of time.

Sub-contracting: This is defined as the use of services of people or institutions which have no direct or indirect link to an institution participating in the project. You can sub-contract activities within the grant. This includes teaching/training assignments and short visits. However, the activities can only be contracted to institutions located in the EU member state or in the ECE country involved in the project.

Taxes. Equipment and services executed under Tempus are exempt from VAT and from other taxes, duties and similar charges in both EU and ECE countries. Tempus will **not** reimburse money paid in taxes. The relevant certificate is provided with your contract.

Changes to the original expenditure plan

1. After your RBAP has been approved, you have to ask the ETF for written authorisation if your spending under any heading exceeds the original allocated amount by more than 10%.
2. Change of more than 25% in the number of flows in each of the two mobility categories (staff or students) also requires written authorisation.
3. Transfer of money from the mobility grant to the organisational grant, requires authorisation. You cannot transfer mobility money to cover overheads or staff costs.

Example:

In your revised budget and activity plan you have planned the following student mobility flows within the mobility grant

Number	Type	Duration	From	To
5	S1	3	CZ	UK
3	S1	5	B	CZ

25% of the total numbers of flows (8) is two. This means that you can either change 2 flows in duration, destination, direction or add, cut or split two flows at the project's best convenience, without needing the specific approval of the ETF.

For example: instead of 3 students going to the Czech Republic, it may happen that only one is sent (due to organisational problems or lower interest than expected). In this case you do not need to consult the ETF for approval because you are within the 25% flexibility allowed. In any case you should mention the modifications in your Annual Report so that an actual picture of the project is given.

Organisational grant. Main budget headings within the organisational grant are staff, equipment, other costs and overheads.

Staff costs. Staff costs cannot be higher than 25% of the total grant and not higher than 50,000 ECU per year. Importantly, fees and salaries paid to partner institutions and to sub-contracting institutions are also considered as staff costs. Document your staff costs with a convention (agreement) for any person employed. The JEP contract includes a standard convention form.

Replacement costs: you can pay replacement costs to the EU institution, to replace teachers for a minimum period of 1 month and a maximum of 10 months. You can also pay academic staff for an exceptional, limited and justifiable task. Academic staff can also be paid for administrative tasks. Academic fees cannot exceed 10% of the total grant.

Equipment cost. Please check the definition of equipment in your Guidelines for the Utilisation of the Grant. Equipment must originate in an EU member state or in a ECE country. Relevant certificates are required. Quotations from three independent suppliers are required if you spend more than 10,000 ECU on equipment specified in a single order.

Overheads. If your overheads do not exceed 2.5% of the total grant in any given year you do not need to provide supporting documentation. You can spend up to 5% if you provide a detailed account of all expenses.

Mobility grants. Guidelines for the Utilisation of the Grant are quite specific as to the limits of subsistence and accommodation costs.

Mobility participants have to provide an Individual Grantholder Report which needs to be sent to the contractor and is an important part of the Annual/Final Report. Familiarise yourself with the categories of mobility in the Guidelines for the Utilisation of the Grant and with expenditure which is not eligible for funding from the mobility grant. Student (but not staff) mobility may include the institutional costs paid to the host institution. Institutional costs may be paid only for study periods at the universities and not for practical placements or participation in intensive courses.

16. JEP ACTIVITY CHECKLISTS

It is beyond the scope of this handbook to provide detailed guidelines or suggestions for every possible JEP activity. These will differ according to the type of institution involved. A number of the suggestions mentioned in the preceding chapters will apply to all of the activities. The tables compiled below are meant to serve as an aide memoire and to remind the coordinator and the Project Management Group of the factors which could be important for particular activities.

Curriculum development. The complexity of the development of new courses and, in particular, new curricula, should not be underestimated. This is a **major undertaking** requiring the broad support and cooperation of many individuals. It cannot be successful without institutional support. The paragraph below only highlights the major relevant issues.

A curriculum cannot be developed by a single individual. At an early stage in the project, it is essential to assemble an appropriate planning team. Such a team should be able to draw on the expertise of advisers from different disciplines.

Early in the planning stages the whole process needs to be **formally approved** by the faculty of the host university.

Planning should start with the assessment of needs and a definition of learning objectives: what should the students be able to do on completion of the course? This should be followed by:

- a. Design of teaching and learning activities through which the objectives can be achieved.
- b. Planning the methods of course evaluation (are we achieving what we planned?).
- c. Planning the methods of course assessment (are students learning what they are supposed to learn?).
- d. The method of knowledge delivery needs to be discussed in an initial phase (e.g. problem based, student centred, self-directed learning).
- e. The integration with other parallel courses (horizontal) as well as with earlier and later stages of the curriculum (vertical) is essential.
- f. Staff development and training needs should be addressed.
- g. The final content and sequence of the course then needs to be planned.
- h. The required logistical support in terms of academic staff and administrative personnel (responsible for e.g. scheduling of the course, available space, etc.) must be defined.
- i. Finally, supporting educational materials, such as lecture and seminar notes, audio-visual aids, etc., need to be prepared.

Curriculum development. General Issues	
<i>Consider:</i>	
1	The strategy of the university/faculty.
2	The level of support by the institutions' academic bodies.
3	Approval of the relevant academic bodies.
4	National policies: approval by the relevant ministry/ recognition by national authorities.
5	European compatibility.

Curriculum development. Assessment of existing courses and requirements for new courses	
<i>Assess:</i>	
1	Competence and potential for development of the existing academic staff. Is staff training required ?
2	Existing equipment.
3	Possibilities for continuation of the new programme at the end of the project funding. A strategy for gradually replacing visiting academic staff by local personnel.
4	Scope for adaptation to local needs.

Curriculum development. Designing new curriculum	
1	Are the objectives of the programme clearly defined ?
2	Is the content of the curriculum appropriate to its objective ?
3	What is its relation to existing curricula ?
4	What is the structure of the programme: proportion between lectures, exercises and project work ?
5	What is the entry level of students ?
6	What are the assessment procedures ?
7	What is the final output: diploma/degree ?
8	Is a pilot phase for implementation planned ? How will it be evaluated ?

Staff development	
1	Is there an academic/administrative staff development strategy within the institution? How will the new staff training/developing activities complement existing activities?
2	How will the staff development activities contribute to other aspects of the JEP (e.g. the restructuring of curricula)?

Creation and restructuring of higher education centres	
Setting-up of new management structures and the development of infrastructure for postgraduate training.	
<i>Consider:</i>	
1	Definition of objective for the new structure.
2	National legislation.
3	Strategy of the university/ faculty/ department.
4	Organisational embedding/institutional support. Involve the relevant academic bodies of the institution concerned in the planning and decision making process.
5	Coordination of the JEP activities with other relevant initiatives at the university.
6	Services offered by the new institutional structure.
7	Competence of existing staff. Is training required?
8	Required equipment.
9	Relation of the new unit to units existing within the university.

Development of universities' capacities to cooperate with industry and other organisations

This may include creation and/or restructuring of Technology Transfer Units and Continuing Education Units at universities, the development of training and consultancy centres for local industry at universities, the creation of practical placements in enterprises, and the exchange of staff between universities and enterprises.

Consider:

1	Coordination with other initiatives in this field.
2	Relation to the existing strategies.
3	Involvement of the relevant academic bodies in the development of new programmes.
4	Local conditions (legal framework, the situation of local industry).
5	University staff knowledge base/training of future staff.
6	The needs of local industry.
7	Marketing of appropriate activities.
8	Creation of mechanisms for dialogue between industry and the university.
9	The legal framework for raising external income at universities (accounting, distributing and using external income, employing staff from external funds etc.).

Intensive courses

These are short courses providing targeted training in a specific subject.

Consider:

1	Intended outcomes.
2	Adaptation of the content of the course to local circumstances.
3	Language proficiency of the audience (provision of translated summaries, copies of slides and overheads etc.).
4	Type of audience

Upgrading of facilities and equipment	
<p>This refers to acquisition of equipment for use in libraries, teaching laboratories, teacher training centres, documentation centres, etc.</p> <p>Within Mobility JEPs, only office equipment can be purchased.</p>	
1	Assess the equipment needs of your programme (student numbers etc.).
2	Discuss whether the planned equipment is essential for the achievement of the JEP objective.
3	Coordinate the specification of equipment with the investment policy of the university to guarantee compatibility.
4	Identify potential suppliers and invite them to tender.
5	Consider after-sales support and service and medium- to long-term maintenance.
6	Ensure proper scheduling in order to avoid problems at the end of the project year.
7	Define requirements for staff training in the use and maintenance of purchased equipment.
8	Review the future accessibility of the equipment.
9	Calculate utilisation time. Does the projected utilisation/number of users justify the expense ?

17. APPENDIX: STANDARD FORMS

This appendix shows examples of standard forms which can be used during the JEP to standardise and simplify communication. It is not obligatory to use these forms, but they may facilitate the management of JEP. In any case, the forms shown should be modified to suit the needs of individual programmes.

A P P E N D I X

Please note the examples of the forms hereafter
are given for guidance only

**TEMPUS PROGRAMME: JOINT EUROPEAN PROJECT
JEP N°**

Proposal to open or use existing bank account for TEMPUS JEP purposes

Institution Address:

.....

Name of bank:

Bank address:

.....

Account name: Bank code:

Account number: Currency:

Person(s) authorised to sign:

Name: Signature:

Name: Signature:

As Administrative Head of (institution)/Finance Officer I confirm that the above account will be used for the purposes of TEMPUS Project expenditure and that any expenditure will be authorised by a JEP coordinator. I understand that EU rules require that all documentation related to this account must be retained for a period of at least five years after the end of the Project.

Name:

Signature of authorised person:

Date: Official stamp of the institution:

NOTIFICATION OF MONEY TRANSFER

To: The Finance Officer

Address of University (contractor):

.....

Date:

TEMPUS JEP N°

This is to inform you that I have now transferred a pound sterling equivalent of a sum of 58,455,632.00 (fifty eight million, four hundred and fifty five thousand and six hundred and thirty two) Polish zloty to the account of:

Address of university:

Bank Address:

Account N°.:

(Tempus JEP N°

Disposition: These funds are to be utilised as follows:

Item		Zloty
support for postgraduate meeting:	refund	.....
textbooks English language:	refund	.....
computers Dept of Medicine:	refund	.....
software:	advance payment	.....
Total		.....

These funds are to be spent under instructions from Prof. (Polish Coordinator) at the Dept. of, tel, Full accounting will be required for advance payments.

Yours sincerely,

Programme Coordinator

Copy: Polish Coordinator

REQUEST FOR MONEY TRANSFER

To: The Finance Officer
Finance Office
Address of university (contractor)

Date:

TEMPUS JEP N° ACCOUNT N°

Please transfer the sum of to the account of:

(.....)

to the account of:

Address of university

Bank Address:

Account N°:

(Tempus JEP N°))

Disposition (Please enclose this note with the transfer):

These funds are to be utilised as follows:

<i>Item (these are examples only)</i>		Zloty
support for postgraduate meeting:	refund	.....
textbooks English language:	refund	.....
computers Dept of Medicine:	refund	.....
software comp graphics:	advance payment	.....
Total		.....

These funds are to be spent under instructions from Prof. (Polish Coordinator) at the Dept. of, tel, Full accounting will be required for advance payments.

Yours sincerely,

Programme Coordinator

STAFF/STUDENT MOBILITY NOTIFICATION OF PARTICIPANT

TEMPUS JEP N°

Mobility Participant

University /Departmental address

.....

Date:

Dear

It is a pleasure to confirm your acceptance as the participant to be assigned to this department in the above EU programme. Your period in this department will commence on and will end on

You will receive a total grant of ECU (local currency depending on the exchange rate) to cover your travel expenses, subsistence costs and costs of accommodation in this country during this 24 week period.

Please note that you will not be eligible for free medical care while in this country. Thus, it is strongly advisable that you take out an appropriate insurance policy. It should be possible to arrange such a policy here at a cost of

With regard to accommodation, I have been advised that it would be best to take short-term (few days) bed and breakfast accommodation at the University until you can make longer term arrangements, which would probably cost per week.

Please note that on completion of your stay you will be required to submit to the Project Coordinator the Individual Grantholder Report. You will be supplied with an appropriate form.

The Project Coordinator's office will be able to book your flights and send airline tickets to you. Alternatively, you may arrange flights and tickets yourself and get a refund of your expenses after your arrival here. Please write or fax me which of these alternatives suits you best. Please give me dates of your preferred travel.

I look forward to meeting you.

Yours sincerely,

Project Coordinator

REQUEST FOR PAYMENT OF MOBILITY GRANT

The Finance Officer
 Finance Office
 Address of university

Date:

TEMPUS JEP N° ACCOUNT N°

Dear

I would be grateful if you could arrange the payments of subsistence/accommodation allowance to Prof. at the Department of Prof. will be coming to this Department for the updating/retraining period of 24 weeks' duration from until

Travel expenses	£
Remaining for subsistence/accommodation	£
Sum payable monthly	£

Please make the following payments

Date	Payment (£)	Please record as
4 Nov 91	Allowance Wk 1-4
2 Dec 91	Allowance Wk 5-8
30 Dec 91	Allowance Wk 9-12
27 Jan 92	Allowance Wk 13-16
24 Feb 92	Allowance Wk 17-20
23 Mar 92	Allowance Wk 21-24
Total Payable	

I would be grateful if £ of the first payment only could be paid in cash (to be collected at Finance Office) with the balance paid by cheque. Thank you.

Yours sincerely,

Programme Coordinator

PROPOSAL FOR STAFF MOBILITY

TEMPUS PROGRAMME: JEP N°

Name:

Institutional address:

Institutional telephone: Fax number:

Home address:

Home telephone:

Institution to be visited:

Duration (weeks):

Proposed arrival date: Departure:

Proposal for Individual (Staff) Mobility

Please state below the proposed aims of your mobility period. Be as specific as possible in your identification of goals and outcomes. Start your statement on this page and continue to the second page. This statement will be very important in helping the host institution to ensure the success of your stay.

APPLICATION FOR STUDENT PLACEMENT

(Page 1 of 2)

P E R S O N A L D A T A

Last name:..... First name:.....

Date of birth:..... Place of birth:.....

Nationality:..... Sex:.....

Address during term:.....

Country:..... Telephone:.....

Permanent address:.....

Country:..... Telephone:.....

Bank account:..... Bank.....

I N C A S E O F E M E R G E N C Y P L E A S E C O N T A C T

E D U C A T I O N

High school diploma (type of school, year):.....

University:.....

Start of studies (year):.....

Area(s) of specialisation:.....

Title of diploma thesis:.....

For which course(s) do you earn credits:.....

I plan to graduate by (year):.....

Major exams already passed:.....

APPLICATION FOR STUDENT PLACEMENT

(Page 2 of 2)

ADDITIONAL ASSETS (OTHER INTERESTS, KNOWLEDGE, ...)

DESCRIPTION OF THE DESIRED PLACEMENT

Desired countries:

Duration

Period from:..... to:.....

Describe your reasons for applying for a TEMPUS-placement. Describe the kind of work you would particularly like to perform.

Date: Place: Signature:

JEP PARTICIPANTS' DATABASE

TEMPUS JEP N°

PARTICIPANT INFORMATION

To enable us to communicate effectively within the project, it is essential that we have accurate information about each participant. Your cooperation in providing this information will be appreciated.

Surname:

First name(s):

Institution:

Department:

Position:

Address:

Telephone:

Fax:

E-mail:

Home address:

Home telephone number:

Languages spoken:

Function in the project:

FINANCIAL MANAGEMENT (NON-MOBILITY) FORM

TEMPUS JEP N°.....

Expenditure details

1. **Item:**

2. **Supplier:**

Supplier's reference:

3. Cost:	Local currency	Contractor's currency	ECU

4. Exchange rate:	Local currency into Contractor's currency	Contractor's currency into ECU

5. Order N°	Date order sent	Date payment	Date statement

6. **Payment mode:**

University order N°

Transfer to:

Transfer date:

7. **JEP budget category:**

Sub-category:

8. **Comments:**

FINANCIAL MANAGEMENT (MOBILITY) FORM

TEMPUS JEP N°

1. Activity details		2. Cost:		
Purpose of travel		Local currency	Contractor's currency	ECU
Surname		International travel		
		air		
Forename		rail		
		other		
Current occupation		Subsistence		
Code of activity				
Origin code	organisation	Total claimed		
Origin code	country	Advance payment to claimant		
Destination code	organisation	Total grant		
Destination code	country	N° of nights		
Duration weeks		Exch. rate local currency into contractor's currency	Exchange rate contractor's currency into ECU	
Date start	Date end			
3. Payments <i>University finance code</i>				
Payment date:				
Transfer to:				
Transfer date:				
4. Comments				

EUROPEAN TRAINING FOUNDATION



*Tempus Department
Villa Gualino
Viale Settimo Severo 65
I-10133 Torino - ITALY
Tel.: (39)11-6302222 Fax: (39)11-6302200
E-mail: tempus@etf.it*

Tempus Contact points in the EU Member States

Austria

Büro für Austauschprogramme
mit Mittel- und Osteuropa
Berggasse, 21
AT-1090 Wien
Austria
Tel.: (43)1-3172793
Fax: (43)1-3172795
E-mail: none

Belgium

French speaking

Ministère de l'Éducation, de la
Recherche et de la Formation
Direction générale de l'Enseignement
Supérieur et de la Recherche scientifique
Cité Administrative de l'État
Rue Royale, 204
B - 1010 Bruxelles
Tel.: (32)2-2105511
Fax: (32)2-2105517
E-mail: none

Dutch speaking

Ministerie van de Vlaamse
Gemeenschap
Departement Onderwijs
Cel Internationale Aangelegenheden
Koningsstraat 136
B - 1000 Brussel
Tel.: (32)2-2114343
(32)2-2114263
Fax: (32)2-2114385
E-mail: johan.geentjens@smtpgate.depond.be

Germany

Deutscher Akademischer
Austauschdienst
Kennedyallee 50
Referat 314
Postfach 20 08 04
D - 53175 Bonn 2
Tel.: (49)228-882414
Fax: (49)228-882444
E-mail: none

Arbeitsgemeinschaft Industrieller
Forschungsvereinigungen (AIF) e.V.
Bayenthalgürtel 23
D - 50968 Köln 51
Tel.: (49)221-3768018
Fax: (49)221-3768027
E-mail: none

Denmark

Rektorkollegiets Sekretariat
H. C. Andersens Boulevard 45
DK - 1553 København V
Tel.: (45)33-925436
Fax: (45)33-925075
E-mail: rks_ibp@al@uvm.dk

Spain

Ministerio de Educación y Ciencias
Subdirección General de Cooperación
Internacional
Paseo del Prado, 28
E - 28071 Madrid
Tel.: (34)1-4201659
Fax: (34)1-4203325
E-mail: none

Finland

Centre for International Mobility
(CIMO)
Hakaniemenkatu 2
P.O. Box 343
FI-00531 Helsinki
Finland
Tel.: (358)0-77477033
Fax: (358)0-77477064
E-mail: juha.ketola@cmo.oph.fi

France

C.N.O.U.S.
Centre National des Oeuvres
Universitaires et Scolaires
Rue Jean Calvin, 6/8
F - 75005 Paris
Tel.: (33)1-40799141
Fax: (33)1-43374348
E-mail: none

A.C.F.C.I.
Assemblée des Chambres Françaises de
Commerce et d'Industrie
Avenue d'Iena, 45
F - 75016 Paris
Tel.: (33)1-40693805
Fax: (33)1-47206128
E-mail: none

Greece

Ministry of Education
EC Direction
Section : B' - Programmes
Mitropoléoustr. 15
GR - 101 85 Athènes
Tel.: (30)1-3228060
Fax: (30)1-3220767
E-mail: ee@yppeph.gov.gr

Greek Rectors Conference
Office of international relations of the
Greek universities
Ippocratus 44
GR - 106 80 Athens
Tel.: (30)1-3606794
Fax: (30)1-3606828
E-mail: none

Italy

Ministero dell'Università e della Ricerca
Scientifica e Tecnologica
Ufficio Relazioni Internazionali
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I - 00144 Roma
Tel.: (39)6-59912167
Fax: (39)6-59912967
E-mail: none

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Higher Education Authority
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Tel.: (353)1-6612748
Fax: (353)1-6610492
E-mail: none

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de l'Innovation Pédagogique et
Technologique
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E-mail: none

The Netherlands

NUFFIC
Nederlandse Organisatie voor
Internationale Samenwerking in Hoger
Onderwijs
PO Box 29777
NL - 2509 LT Den Haag
Tel.: (31)70-4260255/260/57/58
Fax: (31)70-4260255/399
E-mail: mdelemar@nufficcs.nl

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Ministério da Educação Nacional
Gabinete dos Assuntos Europeus
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P - 1051 Lisboa Codex
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Fax: (351)1-7978994
E-mail: none

Sweden

National Agency for Higher Education
P.O. Box 7851
SE-10399 Stockholm
Tel.: (46)8-4535000
Fax: (46)8-4535140
E-mail: staffan.mellvig@vhs.se

United Kingdom

Tempus UK Contact Point
Research and Development Building
The University
UK - Canterbury CT2 7PD
Tel.: (44)1227-762712
Fax: (44)1227-726711
E-mail: tempus.uk@uk.ac.uk

Additional Tempus Contact point

Ministry of Education, Research and Church Affairs
Department for Higher Education
P.O. Box 8119 Dep
N-0032 Oslo
Tel.: (47)22343039
Fax: (47)22342733
E-mail: none

National Tempus Offices in the Phare partner countries**Albania**

Albanian Tempus Office
Committee of Science and Technology
Boulevard Zhan D'Ark
ALB - Tirana
Tel.: (355)42-32083
Fax: (355)42-32083
E-mail: none

Bulgaria

Bulgarian Tempus Office
Bd. Aleksander Stamboliiski 18
BG - 1000 Sofia
Tel & fax: (359)2-815189
Tel & fax: (359)2-807040
E-mail: bgnto@bgcict.bitnet

Czech Republic

Czech Tempus Office
U Luzického semináře 13/90
CZ - 118 00 Prague 1
Tel.: (42)2-538187
Fax: (42)2-24511296
E-mail: ivan@csvs.anet.cz

Estonia

Estonian Tempus Office
Tõnismägi 2
EE - 0100 Tallinn
Tel.: (372)6-460058
Fax: (372)6-460057
E-mail: priit@tempus.estnet.ee

Hungary

Hungarian Tempus Office
Ajtósi Dürer sor 19-21
H - 1146 Budapest
Tel.: (36)1-2515641
(36)1-2515647
Fax: (36)1-3430164
E-mail: hilbert@tempus.huninet.hu
orosz@tempus.huninet.hu
ispanki@tempus.huninet.hu

Mail address: P.O.B. 508

H - 1440 Budapest 70

Lithuania

Lithuanian Tempus Office
Volano str. 2/7
LT - 2691 Vilnius
Tel.: (370)2-629140
Fax: (370)2-226301
E-mail: tempus@kl.mii.lt

Latvia

Latvian Tempus Office
Valnu iela 2
LV - 1098 Riga
Tel.: (371)2-223983
Fax: (371)7820171
E-mail: tempus@com.latnet.lv

Poland

Polish Tempus Office
Foundation for the Development of the
Education System
Al. Szucha 25
PL - 00 918 Warszawa
Tel.: (48)2-6284049/
(48)22-292483
Fax: (48)22-292483
E-mail: tempus@klo.men.waw.pl

Romania

Romanian Tempus Office
Stefan Furtuna Str. 140
RO - 79782 Bucharest 6
Tel.: (40)1-6373590
(40)1-3124577
Fax: (40)1-3121065
(40)1-3124577
E-mail: tempus@ul.ici.ro

Mail address: P.O. Box 15-7
RO - 79782 Bucharest 6

Slovak Republic

Slovak Tempus Office
Staré Grunty 52
SK - 842 44 Bratislava
Tel.: (42)7-726129
Fax: (42)7-720264
E-mail: sq_uto@utp.sanet.sk

Slovenia

Slovenian Tempus Office
Slovenska 50
SLO - 61000 Ljubljana
Tel.: (386)61-1311107
(386)61-1310212
Fax: (386)61-1324140
(386)61-302951
E-mail: albin.babic@mzt.si

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