

TEMPUS

Modernising higher education

TEMPUS IV- FIFTH CALL FOR PROPOSALS **How to prepare a competitive project proposal**

Education, Audiovisual and Culture Executive Agency - Brussels



European Commiss

TEMPU

<http://ec.europa.eu/tempus>

OUTLINE OF THE PRESENTATION

Part I. eForm and required attachments

Part II. Preparing the application based on the requirements of the call



I. eForm and required attachments



eForm Structure (main body)

Part	Content
Front Page	Identification of the Call and Programme
PART A	Identification of the Applicant and other organisations participating in the project
PART B	Organisation and Activities
PART C	Description of the project (basic data)
PART D	Operational capacity
PART E	Project implementation / Award criteria (the project in details)
PART F	Workplan in Workpackages

eForm Structure (attachments)

No.	Content
1	Declaration of Honour by the legal representative of the Applicant organisation (pdf / jpg)
2	Logical Framework Matrix (Word document)
3	Work-plan and Budget (Excel Tables)

These attachments are **compulsory**.

Templates are available on the Agency website.

PART A - Identification of the Applicant and other organisations participating in the project

Partner 1 (APPLICANT)

- A1** Organisation (role, name, address, telephone, email etc + **Nr of Erasmus University Charter for institutions in EU Member States**)
- A2** Person responsible for the management of the application (name, address, telephone, email etc.)
- A3** Person authorised to represent the organisation (legal representative) – only for applicant organisation

Partner 2, 3... (partners)

A1
A2



Part A & B must be completed for each organisation participating in the project

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PART B Short description of organisations & their activities

B1 Structure:

Status: Private / Public

Type of organisation

B2 Aims & activities of the organisation

key activities related to the project theme (free text, 1000 characters)

role of the organisation in the project (free text, 1000 characters)

B3 Other EU grants

support received from Tempus in the last three years (table)

other grant applications applied for the same project (table)

*List of partner organisations
is generated **automatically** after filling in Part A and B*

PART C. Description of the project (summaries)

C1 Timing of the project

C2 Specific objectives (free text, limited 1000 characters)

C3 Tempus objectives, themes and priorities (tick boxes and limited free text)

C4 Partner countries involved (tick boxes)

C5 Summary of the project (free text, limited 2000 characters)

C6 Summary of the work-packages (automatic)

C7 List of deliverables – outputs/outcomes (automatic)

C8 Summary budget

C9 Project history

PART D. Operational Capacity

D1 Skills and expertise of key staff involved in the project

- organisation number
- organisation name
- key person name: summary of relevant skills and experience (free text, 750 / person)

D2 Specific tasks that will be sub-contracted to bodies outside the formal consortium



PART E. Project implementation / Award criteria

E1 The project rationale – Relevance

(needs analysis, priorities addressed, objectives, target groups)

- limited space: 6000 characters

E2 Quality of the partnership

(suitability to work together, specific and complementary skills and expertise) - limited space: 6000 characters

E3 Project's content and methodology

(academic content, pedagogical approach, methodology, LFM)

- limited space: 12000 characters

E4 Dissemination & sustainability - limited space: 4000 characters

E5 Budget and cost effectiveness - limited: 2000 characters

PART F. Workplan in Workpackages (1)

F1 Identification: WP nr - type:

Development (substance of work)
Quality plan (quality control and monitoring)
Dissemination
Exploitation of results (sustainability)
Management

**At least one
of each type
of WP must
be completed**

Start – End – Duration

Related assumptions and risks (limit 400 characters)

Description (limit 2000 characters)

F2 Deliverables – outputs / outcomes

Title
Type or nature
Delivery date
Dissemination level
Target groups
Language(s) of the product

PART F. Work-plan in Work-packages (2)

F3 Consortium partners involved:

Lead partner

Other partners

Role and tasks in the WPs (limit to 400 characters)

F4 Resources required to complete WPs

Staff categories – number of days – for each partner organisation

Tasks to be sub-contracted

Travel: Staff, Students: number of flows / destination

Equipment

Printing and publishing

Other costs

eForm features

- An electronic application form that can only be submitted via the internet
- A form that does not require you to be online when you are filling it in or validating it
- An interactive pdf form that uses Adobe's Acrobat Reader (which can be downloaded from Adobe's website [FREE OF CHARGE](#))
- An intuitive, easy-to-use application form



eForm – technical requirements

- The form requires Adobe Acrobat Reader (or Standard or Professional) to be installed on your computer – this may require the intervention of your IT department
- Version must be 8.1.3 or higher (incl. v9)
- An internet connection and standard browser software are required
- There is no software specific to the eForm



Practical hints

- Read the **eForm User Guide** before starting to fill the form
- Make sure that you have the necessary **IT support**
- Do not try to fill the form directly on the website – **download** it first on your computer
- Fill in all fields on the front page before starting to fill the other sections
- **Save** the form regularly
- Maximum size of **attachments 5MB**
- Do not validate the form until you have finished completing it
- The **submitted form is locked** – cannot be changed



eForm required attachments

1. The workplan and budget :

- The workplan table (Excel Sheet 1)

- ✓ Same as presented in the eForm as work-packages (development, dissemination, management....)

- The budget tables (Excel Sheets 2-10)

- ✓ Do not underestimate the workload needed to fill in the 10 Budget tables
- ✓ Ensure full consistency between the inputs mention in the eForm and their costs indicated in Excel tables
- ✓ Make sure that your costing is realistic
- ✓ Cross-check the coherence between the different budget tables

eForm required attachments

2. The Logical Framework Matrix (LFM):

- ✓ Read literature on LFM
- ✓ Ensure that entries are consistent with the previous sections & adequately completed
- ✓ Re-check the logic of the project as set out in LFM
- ✓ Indicators of progress (quantitative / qualitative) should be specific, measurable, realistic and relevant to the project objectives and outcomes
- ✓ Identify & address main assumptions & risks
- ✓ Ensure that LFM is consistent with the project description

eForm required attachments

3. The Declaration of Honour:

- ✓ Signed by the person authorised to enter into legally binding agreements on behalf of the applicant organisation
- ✓ Certifies that applicant institution is not in any of the situation referred to in Articles 93 and 94 of the Financial Regulations (see Section 6 “Exclusion Criteria” – Fifth call application guidelines)
- ✓ The Declaration of Honour, is the only document that must be **signed in original**.



II. Preparing the application based on the requirements of the call

Sources of guidance

- The **Instructions for Applicants** (to complete the application and the compulsory documents)
 - ⇒ Rules and guidance on eForm content and the entire application process
- The **eForm User Guide**
 - ⇒ Help with the technical aspects of completing the eForm
- Still need further assistance...?
 - ⇒ NTOs/NCPs
 - ⇒ EACEA-TEMPUS-CALLS@ec.europa.eu
 - ⇒ EACEA-HELPDESK@ec.europa.eu





The Call Requirements

The selection process is based on the assessment of applications against 4 types of criteria:

- ❖ Eligibility Criteria
- ❖ Exclusion Criteria
- ❖ Selection Criteria
- ❖ Award Criteria

Eligibility criteria

Most of eligibility criteria (see Section 5 and 14 of the Call) are featured in the e-form; following criteria are double checked by the Tempus Selection Team:

1. **Formal submission requirements**
2. **Grant size and duration**
3. **Applicant, Partners and Partnership requirements**
(number of partners, status of the grant applicant & partners, etc.)
4. **National & regional priorities**

*It does not matter how well the project has been designed if it does not fulfil the eligibility criteria: this will lead to the **automatic rejection** of the proposal*

Main reasons for rejection based on formal criteria, 2011

Out of **525** projects received, **48** were rejected for not complying with eligibility criteria:

- ☒ Minimum number of **higher education institutions**
- ☒ Type of applicant
- ☒ Obligation to provide legal supporting documents (Mandates)
- ☒ Relevant parts of the application not completed (work plan and budget tables)

Exclusion criteria

- ✓ The applicant institution is not in one of the situations referred to in Articles 93 and 94 of the Financial Regulations (such as bankruptcy, professional misconduct, subject of fraud, corruption, administrative penalty, conflict of interest, etc)

Based on:

- The **DECLARATION OF HONOUR** signed by the Legal Representative of the applicant institution

Selection criteria

- ✓ The applicant has the operational and the financial* capacity to complete the proposed activities

Based on:

- **DECLARATION OF HONOUR** signed by the Legal Representative of the Applicant institution attesting the status, legal person, having financial and operational capacity to complete the proposed activities
- Assessment of applicant institution's
 - skills and expertise
 - profit and loss accounts + balance sheet for the last 2 financial years**
 - bank details form certified by applicant and bank

* EACEA can reject application, ask for more info, require a financial guarantee...

**Not required for public bodies.

Award criteria

Five award criteria defined in the Call

1. Relevance (25%)
2. Good quality partnership (20%)
3. Quality of the project's content and methodology (25%)
4. Dissemination & Sustainability (15%)
5. Budget and Cost-effectiveness (15%)

(1) Relevance

- ✓ The **national/regional priorities** are addressed.
- ✓ **Key problems** and **needs** of the specific Partner Country/ies and of the potential stakeholders are identified.
- ✓ The **objectives** are **realistic** and **relevant** for the reform strategies of higher education in the Partner Countries
- ✓ The real needs & problems of the clearly defined **target groups** are addressed; relevant stakeholders are included
- ✓ The project describes how the project will contribute to solving the identified problems.
- ✓ It explains how the project proposal was prepared.

WHERE in the E-form? E.1 The project rationale; C.2 Specific Objectives ; C.3 Summary of the project

(2) Quality of the Partnership

- ✓ The partnership includes all the skills, recognised expertise and competences required to address the needs of the PC Higher Education Institutions or systems and to achieve the project objectives
- ✓ Each partner PC / EU should demonstrate how their experience and their role (stressing the skills and competencies) is relevant in the planned project activities
- ✓ The partnership ensures a regional dimension and diversity (no partners) and a balanced distribution of tasks (no “sleeping partner”)
- ✓ Measures to ensure effective communication among the partners are described

WHERE in the E-form? B; D.1 Skills and expertise of key staff

(3) Quality of Project Content & Methodology

Description of the project as a whole, including:

- ✓ The **academic content and the pedagogical approach**; appropriate methodology, involvement of stakeholders in general, the link between wider and specific objectives and between expected outcomes and activities,
- ✓ The **quality control processes** foreseen and the **monitoring measures** that will be implemented.
- ✓ The **management** of the project, roles and responsibilities allocated to each partner, decision-making process and implementation structure.
 - Make sure that the information in this section is consistent with the LFM
 - Ensure a balanced distribution of tasks (+ role of Lead partner in work-packages)

WHERE in the E-form? E3. The project & F. Workpackages; + LFM

(4) Dissemination & Sustainability

- ✓ How information/outcomes of the project will be made available to groups not directly involved
- ✓ How the expected results will be sustainable in the long term (financial, institutional and policy level)

The project should consider to:

- develop a “visual” identity of the project
- clearly identify target groups
- plan internal (within PC institutions) & external (in the PC) dissemination
- use a wide range of dissemination tools
- advertise the first results / products
- consult and involve the relevant stakeholders (decision makers at national and institutional level, students organisations, professional organisations, private sector)
- demonstrate arrangements for recognition / accreditation of new courses
- evaluate and describe what will happen after the end of the project
- consult Tempus handbook “Sustainability through Dissemination”

WHERE in the E-form? E4. Dissemination & Sustainability; F. Workpackages

(5) Budget and Cost Effectiveness

- ✓ Implementation of project activities and achievement of expected results and objectives in **the most economical way** and respecting the **Tempus financial rules**

Concretely, the project should:

- Respect the salary and mobility rates (according to type of task in the project and not the status of the individual) and the budget ceilings for staff costs and equipment
- Plan a reasonable/efficient amount of staff costs for each activity (including reasonable management costs)
- Use efficiently the mobility periods – making best use of time abroad for maximum benefit
- Limit the equipment purchase to what is necessary for the implementation of the project
- Check carefully the eligibility of expenses and account the expenses under the right budget heading
- Explain the principles for budget allocation amongst partners
- Eliminate calculation errors and check the consistency of the different parts of the budget

Attention! : Inflated budgets are marked severely!

WHERE in the E-form? E5. Budget & Cost-Effectiveness; Budget Excel Tables

Workpackages (WPs), Outcomes & Activities

- Provide a logical structure of activities grouped in work-packages, with a reasonable number of deliverables / outcomes
- Ensure a logical progression of outcomes within each WP from one project year to next
- Propose suitable activities to achieve each individual outcome
- Identify and quantify all appropriate target groups (no general statements)
- Envisage realistic inputs directly relate to activities & are cost-efficient*
- Identify and justify financial resources needed to deliver the output/outcome & relate appropriately with budget (Excel tables)
- Plan appropriate number of individual mobilities, the direction and duration for each mobility flow in relation to each activity

***Only amount of resources is require in the eForm; corresponding costing must be provided in the Budget Excel Sheets**

Quality of language & Clarity of Information

- ✓ Choose the language with which all project partners are the most comfortable
- ✓ Explain the concepts and ideas (avoid abbreviations, acronyms)
- ✓ Be precise & specific: provide facts and figures; indicate WHY, by WHOM and HOW something will be done
- ✓ Avoid “patchwork” (copy-paste information)
- ✓ Before submitting, ask somebody who does not know the project to **read/proofread the draft** proposal.

Avoid the most common mistakes

- ❖ Remember that only information presented in the application can be assessed
- ❖ Do not assume prior technical or “historical project related” knowledge on the part of the assessor

How to start up...

- Read the Call for Proposals carefully, in particular
 - **changes** btw 4th and 5th call
- First check the **new priorities** (national & regional) then decide which of the themes identified in the Call would be best to develop a project
- Read the Instructions for completing the application form and compulsory attachments* + the eForm User Guide carefully
- Find interested and **relevant** partners
- Consult your NTO / NCP early
- Be aware of other HE projects in the PC concerned (**no double funding**)

* *Declaration of Honour, Workplan and Budget tables, LFM*

When to start?

- ✓ As early as possible
- ✓ Set a realistic time-frame for project preparation (including reception of Mandates from partners)
- ✓ Get information on technical requirements for on-line submission as early as possible
- ✓ Establish methodology: who will develop what part (narrative, financial, attachments, etc.)
- ✓ Decide on the communication strategy
- ✓ Decide WHO will write the draft; complete the eForm; submit the eForm and attachments

Help available from

- ✓ National Tempus Office Co-ordinators in Partner Countries (NTO)
- ✓ Tempus National Contact Points in EU Member States (NCP)
- ✓ EACEA website – check for regular updates

http://eacea.ec.europa.eu/tempus/participating_countries/index_en.php

We hope your ideas will fly!



Thank you for your participation!

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