Erasmus+ - Key Action 2
Capacity Building within the Field of Higher Education

TIGRIS Project

Project number: 586290-EPP-1-2017-1-DE-EPPKA2-CBHE-SP

Guidelines for Bi-annual Partner Reports *(v. 1.1)* [1]

Work package	Title
6	Management
Activity	Title
6.3	Financial and administrative management

[1] The guidelines might be revised and/or amended in the future.

Contents

1. Preface

Dear Colleagues,

After sending out the reminder regarding the first Bi-annual Partner Report, I was approached with questions regarding the form of the report as well as parameters on what it should include.

Hence, a short guideline regarding form and content of the Bi-annual Partner Reports.

1.1. Changes introduced in version 1.1

The guidelines were updated to version 1.1 on June 27, 2018. The following changes were introduced:

- Update of document format to the requirements of the TIGRIS Communication Management Plan (CMP);
- Correction of spelling and grammar errors;

Since only formal changes were made, no formal approval of the guidelines is necessary.

2. Reporting commitment

The request for submission of Bi-annual Partner Reports is in line with the project proposal, which states that "*local coordinators will provide regular updates on the implementation of the project and will prepare relevant reports (financial/administrative) and send them to the project coordinator every six month*" (see project proposal, p. 76-77).

3. General aim, scope and content of the Bi-annual Partner Reports

Hence, the mandatory reports generally include information about the administrative and, to a lesser extent, financial implementation of the project. In addition, they should include any information a partner deems relevant for or conducive to the implementation of the project.

The reports also provide every partner with an individual backchannel to the Project Coordinator (UGOE) and give the opportunity to provide UGOE with feedback, requests, recommendations and ideas, and, of course, points of critique.[2]

4. Volume and general reporting principles

Regarding page volume, no minimum requirement or limit is given. The rule of thumb is to provide the information required in as little text as possible.

Reporting in general should be based on the principles of necessity, usefulness, and appropriateness.[3]

5. Purpose of the Bi-annual Partner Reports

The Bi-annual Partner Reports serve several purposes:

[2] This is, of course, in addition to other communication channels like e-mail, phone, personal meetings, etc.
[3] Ask yourself: Was the information requested by the coordinator or does the coordinator need to know (necessity)? Is the information conducive to the implementation of the project as well as the reporting efforts vis-à-vis the EACEA (usefulness)? Is the report the appropriate channel for conveying this information, e.g., if it is urgent, other communication channels should be used (appropriateness)?

- Firstly, the partner reports help to monitor the general progress of the project and help to get a firm grasp on where we stand in the local implementation of the project.
- Secondly, the reports serve as an input for the upcoming midterm report to the EACEA and therefore play an important role in the review of the project by the funding institution **(!)**.
- Thirdly, the partner reports give each partner the opportunity as well as the obligation to summarize and review his decision, actions, and activities undertaken to implement the project, thus serving as an individual benchmark opportunity against individual project duties and objectives.
- Finally yet importantly, the information conveyed in the partner reports serve as an input for the coming project newsletter(s) which will disseminate important information (e.g. best-practice-examples) among partners.

6. Reporting Period

The Bi-annual Partner Reports are due every six months, counting from the start of the project. For the TIGRIS Project, this is October 15th, 2017, resulting in the reporting schedule shown below.

The reporting period covers the whole past six month since the beginning of the project or else the period since the last partner report.

7. Overview regarding Bi-annual Partner Reports and their deadlines*

No. of Bi-annual Partner Report	Deadline
1st Bi-annual Partner Report	April 15th, 2018 (extended to April 30th, 2018)
2nd Bi-annual Partner Report	October 15th, 2018
3rd Bi-annual Partner Report	April 15th, 2019
4th Bi-annual Partner Report	October 15th, 2019
5th Bi-annual Partner Report	April 15th, 2020
6th Bi-annual Partner Report	October 15th, 2020

* Reminders will be sent to every partner via email one month prior to the deadline.

8. Partner-specific content of the Bi-annual Partner Reports

Different partners play different roles in the project; therefore, the content of the partner reports also differs.

8.1. For the European partners (MU/GII/KUL/RUG) and KISSR (as WP or Task leader)

Since the European partners are, fully or in part, responsible for the activities implemented in the different Work Packages (WP), their report should include information about …

- … the status of the WP (if WP leader) or task (if Task leader);
- … activities/measures implemented under their supervision;

In regards to the activities and measures implemented, it would be desirable if the reporting would contain not only the basic information[4] but would also include a short

[4] Who, what, why, when, where, how, by whom…

reflection on the implementation of the activity itself[5] as well as the perceived outcome of the activity.[6]

In addition, further project-related information could be conveyed, e.g., ***(list not exhaustive)***

- … institutional and/or organizational support by the home institution during implementation of the project;
- … external factors / issues affecting implementation of the project (e.g. travel restrictions, visa requirements, administrative hurdles, etc.)
- ...

8.2. For the Regional Coordinator

Since KISSR acts as Regional Coordinator of the TIGRIS Project, its reports should include information regarding the regional coordination in general, its modus operandi and efforts undertaken so far.

8.3. For the Kurdish partners

The TIGRIS Project aims to support the Kurdish partners in their efforts regarding modernization, accessibility, and internationalization, thus rendering the Kurdish institutions the main focal points for implementing the project and realizing its objectives.

Subsequently, the reports by the Kurdish partners should include information on the project's implementation at the local level and efforts undertaken so far. Following question should be answered ***(list not exhaustive)***:

- Which internal processes were initiated and which decisions taken to implement the project? (e.g., establishing of regular meetings, dedicated working groups, etc.)
- How and by whom are decision taken?
- Which university-bodies are involved in the project and its implementation?
- What resources (personnel, equipment, etc.) have been allocated to the project?
- Who holds which function/responsibility at the local level and carries out which tasks?
- Who is charged with supervision of the project at the local level?
- (Dissemination) How was the project (participation, objectives, activities) communicated internally (at the institution itself) as well as externally (vis-à-vis the public, third parties)?

In addition, the report by the Kurdish partners should include information on their participation in trainings and other project activities. This section also serves as feedback regarding the activities organized by the project. Following question should be answered ***(list not exhaustive)***:

- In which activities did the partner take part in and who participated in what function/role? (For the first report this is, of course, the Kick-Off meeting as well as the study visits in WP2.1)

[5] What worked out well? What did not work out?
[6] E.g., what needs became apparent that have to be addressed in the future.

- How would you assess the activity taken part in, organizationally as well as content-wise?
- Which conclusions could be drawn from participating? Which issues/needs became apparent that need addressing by the project?
- How were information, conclusions, and results gained by participation disseminated at the local level (report, minutes, meetings, etc.)?
- Which external/internal factors helped or hindered in the participation (e.g. assistance provided by hosts, visa issues, etc.)?

9. Financial reporting

The Bi-annual Partner Reports should be an occasion used by the partners to review the status of their financial handling of the project and report it back to UGOE. This includes also information on problematic issues arising during the financial administration.

Amongst other things, each partner should check …

- … if the proper and correct supporting documents for claiming costs from the project's budget are at hand and archived properly;
- … if the time sheets for every person involved in and financed by the project have been filled out completely and properly;
- … if the supporting documents, requested by the project's coordinator (UGOE), have been submitted to the coordinator;
- … if project funds awarded to the partner have been claimed to the maximum.

9.1. Co-financing

The grant was awarded under the condition of co-financing by the partners, meaning that not all costs incurred during the projects are covered by the funding awarded by the Erasmus+ Programme of the European Union (see Guidelines for the Use of the Grant, p. 6).

Though those costs are not reimbursed, the project partners are asked by the EACEA to indicate the level and source of co-financing.

Therefore, each partner should submit information about the level (amount) and source (e.g. budget of home institution) of financial means spent on the TIGRIS Project under the pretext of co-financing.

For the purpose of reporting, co-financing shall be considered all project-related expenditures that cannot be claimed from the project's budget. As a formula:

(all projected-related expenditures) - (costs claimed from project's budget) = co-financing)