

The Sport Science Physical Activity Innovation and Entrepreneurship Partnership

Erasmus-Sport-2024-SCP-101184836



Deliverable 1.2 Guidelines regarding administrative and financial management

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Key words

Project management, reporting communication

Description

Description of the deliverable (in the proposal): Written guidelines in English containing instructions and advice for financial and administrative management, based on the rules of the Erasmus+ programme, and the content of the Grant Agreement.

The **objective** of this deliverable is to create a comprehensive understanding of the administrative and financial management as well as the internal communication set-up of the SPIEP project, ensuring compliance with Erasmus+ programme regulations and the Grant Agreement while achieving project objectives efficiently.



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Project Consortium

	Partner	Short	Country
1	NORGES IDRETTSHOGSKOLE	NIH	Norway
2	UNIVERSITE DU LUXEMBOURG	Uni.Lu	Luxembourg
3	FREDERICK UNIVERSITY	FredU	Cyprus
4	UNIVERSITATEA DIN CRAIOVA	UCV	Romania
5	LIETUVOS SPORTO UNIVERSITETAS	LSU	Lithuania
6	INTERNATIONAL UNIVERSITY OF HEALTH, EXERCISE & SPORT SA	LUNEX	Luxembourg
7	Ungt Entreprenørskap Norge	JA Norway	Norway
8	JUNIOR ACHIEVEMENT - YOUNG ENTERPRISES CYPRUS	JA Cyprus	Cyprus
9	Stiftelsen Beitostølen Helsesportsenter	BHSS	Norway
10	ASOCIATIA LANGDON DOWN OLTENIA-CENTTRUL EDUCATIONAL TEODORIA	Aldo-CET	Romania
11	FIT4CURE	FIT4Cure	Denmark
12	WAVY MEET SARL	Wavy MEET	Luxembourg
13	Melathron Agoniston tis EOKA	Melathron	Cyprus



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Definitions, Acronyms and Abbreviations

GDPR	General Data Protection Regulation
HEI	Higher Education Institution
I+E	Innovation and Entrepreneurship
SSPA	Sport Science and Physical Activity
WP	Work Package
WPL	Work Package Leader
COO	Coordinator
PM	Project Manager
PPL	Partner Project Lead
E-URAB	End-User Relevance Advisory Board



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Administrative Management

Introduction

These guidelines ensure that the SPIEP project is managed efficiently, adheres to national and EU regulations, and achieves its objectives within budget and on time. The structured approach to administrative and financial management fosters collaboration, transparency, and accountability among all partners.

Coordination and Management

In SPIEP, Agile Project Management shall be adopted across all stages and levels for efficiently achieving project objectives and produce high-quality outcomes.

Operational Management at project level will be overseen by Pro-rector for innovation Elin Kolle (NIH), ensuring project completion according to standards outlined in the Grant Agreement. Operational Management focuses on the processes, systems, and resources needed to keep the project running effectively in the medium and long term, making sure that operations are running efficiently, aligning them with the overall project goals, and ensuring that the project is meeting its performance objectives.

Daily Management at project level will be dealt with by the SPIEP **Project Manager**, Frode Paulsen (NIH), who will manage day-to-day operations, ensuring the project progresses through all activities as per the Grant Agreement. The Daily Management focuses on the day-to-day tasks, activities, and issues that arise in the project, ensuring that everything is running smoothly and that the team is staying on track with their immediate work and planned deliverables.

At **partner level** the responsibility for Operational and Daily Management will be overseen by a **Partner Project Lead (PPL)** appointed by the partner, who will ensure the partner's project completion adheres to standards agreed upon. At this level, Operational Management focuses on the processes, systems, and resources needed to keep the project running effectively at the partner. It involves making sure that operations are running efficiently, aligning them with the overall project goals, and ensuring that the project is meeting its performance objectives. The PPL will ensure that the partner executes the actions needed to meet the partner's responsibilities in the Grant Agreement, thus contributing to the success of SPIEP.

The partners responsible for work packages must appoint **Work Package Leaders (WPL)**. The role of the WPL encompass design, implementation, evaluating WP strategies, coordinate activities, including preparation of deliverables and report progress to the SPIEP COO, i.e., submit internal reports every second month, detailing WP-specific progress, and completion of objectives. It is up to the partner whether the WPL is the same person as the PPL.



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Management Committee (MC) composition: Includes SPIEP PM, PPLs, and the Communication Manager appointed by the COO. MC is responsible for ensuring fluid communication, robust monitoring, and reporting of project progress. It discusses WP-specific progress, budget issues, and completion of objectives bi-monthly. (See proposal pp. 30-31 for further details.)

The End-User Relevance Advisory Board (E-URAB) consists of representatives from the non-HEI partners and is chaired by the project manager and will ensure end-user relevance and appropriateness of project content, leveraging their direct experience with target groups for course relevancy and resilience. The non-HEI partners represent the closest links to the vulnerable groups that SPIEP intends to impact positively. Therefore, they will provide unique competences and experiences of high value for the WP leaders. In a sense, these partners represent both the “problem-owners” and the “solutions-providers”, in various ways being involved in physical activity in vulnerable groups on a daily basis, some of them promoting physical activity as their primary objective. Thus, the WP leaders will involve the E-URAB in the development of the training modules in all WPs, to ensure that the content developed is relevant and meets the need of the problem-holders and end-users.

Internal communication

“Internal” in this context is defined as the group of people doing work in SPIEP, responsible for the project’s success. In the internal communication, the COO is responsible for:

- Developing a communication strategy (with the Communication Manager)
- Organizing regular meetings (e.g., with PPL and WPL)
- Facilitating inter-partner communication
- Coordinating internal updates on project activities
- Maintaining a centralized information repository

All partners must inform the SPIEP COO of:

- The distribution of project responsibilities among personnel internally at the partner, such as appointments of contact persons and WP leaders,
- Any changes to their name, address, legal representative, legal, financial, technical, organizational or ownership situation
- Any event likely to affect or delay the implementation of the project
- All partners must comply with the provisions of the Grant Agreement and inform the Project Leader of any changes or events that could affect the project.

All partners are responsible for **keeping record** of the project’s documentation, demonstrating the reality of activities, including reports, agendas, presentations, media, and minutes.

There are three Consortium Meetings included in the SPIEP project plan:



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- The Initial Meeting: In-person in Oslo by end of Month 2.
- An Online Meeting at Month 14, focusing on WP implementation and the planning a sport science physical activity innovation and entrepreneurship conference in M18.
- The Final Meeting: Coinciding with the sport science physical activity innovation and entrepreneurship conference in Luxembourg during Month 18.

For internal communication in-between the meetings SPIEP has established Microsoft Teams (MS Teams) as the core communication tool and designed a SPIEP MS Teams site for the effective communication needed for the project to reach its objectives.

The decision to choose a tool such as MS Teams was driven by several compelling reasons that align with the project's complex structure and diverse partnership, years of positive experiences from use of MS Sharepoint and MS Teams for document management and communication at institutional level – as well as suboptimal past experiences with international project collaboration based on communication with email, including chaotic document management

MS Teams is an effective choice as a centralized communication platform as it offers a unified workspace that consolidates all communication, collaboration, and information sharing in one place. This centralization is crucial for a project involving multiple partners, as it minimizes fragmentation and ensures that all participants stay informed and engaged. With features like screen readers, live captions, and translation services, MS Teams is accessible to all team members, including those with disabilities. This inclusivity is important for ensuring that every partner can fully participate in the project.

MS Teams enables Efficient Team Collaboration through the opportunity to create specific teams and channels within MS Teams allows us to organize discussions and coordination according to work packages (WPs), tasks, and partner groups. This structure facilitates targeted communication and collaboration, ensuring that relevant information is easily accessible to those who need it.

Furthermore, MS Teams supports Real-Time Communication through instant messaging and video conferencing, enabling real-time communication across all partners. This immediacy is essential for resolving issues swiftly and receiving prompt feedback, helping maintain momentum and efficiency throughout the project. Another valuable feature is the platform's integration with Microsoft Office applications allowing for seamless document sharing and collaborative editing. Partners can work simultaneously on documents, enhancing productivity and ensuring that everyone is contributing to and benefiting from shared knowledge. Teams site will serve as an important informal communication platform for asking questions and sharing updates throughout the project.

At the SPIEP MS Teams site, information is now sorted in one channel per WP and responsibility for adding folders and keeping order is awarded to the WP leader. Given the sensitive nature of project data, MS Teams offers the security features necessary to protect information. With



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encryption and compliance with GDPR, partners can trust that their communications are secure. The platform facilitates announcements and feedback loops, ensuring continuous updates and fostering an environment of ongoing improvement. This is essential for maintaining transparency and engagement among all partners. The mobile MS Teams app enables partners to stay connected even when away from their desks, ensuring that communication and collaboration are uninterrupted.

Choosing MS Teams for internal communication and as the digital infrastructure in our project is a strategic decision that supports efficient collaboration, robust security, and inclusive participation. By leveraging its comprehensive features, we ensure that all partners can work together effectively, driving the project towards successful outcomes utilizing Microsoft 365 for shared project folders, templates, and video-calls to facilitate smooth internal communication.

Internal Reports: Regularly updated at the MS Teams site by WP leaders, analysed by partner project leaders, and summarized in management committee meetings.

Visual Identity: SPIEP will acknowledge Erasmus+ support in all disseminated documents, outputs, and statements as per the European Commission's guidelines.

Financial Management

Lump sum budgeting makes financial reporting nearly obsolete

SPIEP was funded through a process where the **lump sum budgeting** (LSB) model was used. Most SPIEP partners are unfamiliar with the implications this will have for the implementation of the Erasmus+ project, which is why some guidance is provided below.

LSB is a measure in EU's efforts to simplify grant management procedures. In the case of SPIEP, the LSB was based on cost estimations upfront in the EU granting authority and the lump sum was prefixed by the call (lump sum type 1a), and our budget had to add up to the prefixed total. We submitted a budget which was evaluated together with the rest of the proposal, and did not get any suggestions for changing it in the evaluation summary report.

The project is to be implemented as outlined in the approved application and the focus shall be on completing all planned activities to achieve the project's objectives.

For the Reporting Stage, LSB funding removes all obligations on actual, incurred cost reporting per project and financial ex post audits i.e., a major reduction of administrative burden. The intention is a shift in focus from financial management and checking costs to focus on content of the projects (outcomes, milestones and deliverables).

At the end of the project period, SPIEP must submit the technical and financial report in the Periodic Reporting module of the online Grant Management System (also known as Funding and



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Tenders Portal, FTOP). The final report must detail the activities carried out and the results achieved. The approach is the same as for actual costs grants except that in lump sum grants:

- The COO must complete the 'status of work packages' table in the Grant Management System and mark work packages as "completed" or "not completed"
- The technical report should focus on the completion of work packages (in particular, when you declare a work package as completed, the report must explain and justify this)
- The financial report is much simplified and largely automated

Normally, for a project to be regarded as "completed" all deliverables must be completed, meaning that the underlying work has been done, and the deliverable reports have been submitted and accepted, while a successful outcome is not required. In other words, the definition of "completion of work packages" is not based on a successful outcome, but on the completion of activities as described in the description of action.

In conclusion, Erasmus+ focuses on the overall completion of planned activities without the need for detailed financial reporting. While this reduces the need for financial reporting related to ERASMUS+/SPIEP, be aware that project partners are still obliged to follow accounting procedures in line with national legislation, internal rules and procedures as well as international standards to ensure sound financial management.

External Reports are to be submitted by the COO to Erasmus+ in accordance with the obligations and schedule in the Grant Agreement.

Financial Oversight

Based on the distribution of funds set up in the Grant Agreement, each of the partners' financial departments will:

- Aid in developing budgets, specifying costs in accordance with responsibilities, planned activities and project roles
- Control the partners financial expenditure while ensuring compliance with budget and performance targets
- Assist in explaining and implementing the LSB simplification measures

Payments

The first payment of 70% will be paid after the EU releases the first pre-financing payment to the SPIEP COO, and upon all partners signing the Partnership Agreement. The Final Payment (30%) balance will be paid by EU via COO NIH to partner once all contractual duties are met and the final report is approved by EACEA.



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