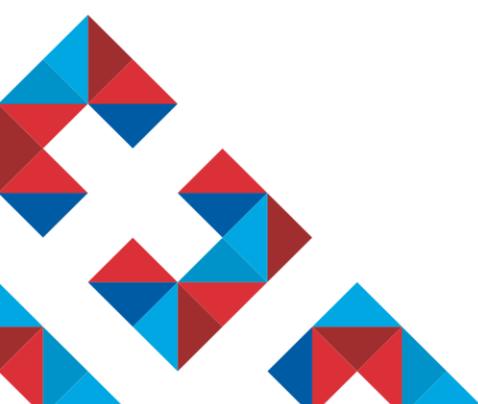


Erasmus+ 2014 Call

Interim Report Guidance

Key Action 2
Strategic Partnerships in the field of Youth

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History Page

This page outlines the document history from the date of creation, noting all minor and major changes undertaken on the document and any supplementary document.

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1. Introduction

This guide is designed to help you complete and submit the Interim Report for your Erasmus+ Key Action 2 Youth project. It will provide technical advice on submitting the report and the documentation required by the UK National Agency (UK NA). Further information regarding all aspects of your Key Action 2 Youth project can be found in the Handbook which can also be downloaded from the 'Manage your Grant' section on the Erasmus+ website.

The Interim Report is an important part of your project as it provides an account of the implementation of the project so far, which allows the UK NA to assess the development of the project.

You are contractually required to submit an Interim Report to the UK NA by the date specified in article I.4.2 of your grant agreement. This article also details the reporting period that you should cover within the report. **Non-submission of an Interim Report may lead to your project being terminated and a refund of all pre-financing payments being requested.**

The Interim Report should be submitted directly to your Project Officer via email and also copied to erasmusplus@ecorys.com. Your Interim Report will be made up of a qualitative and a financial section. Please ensure that you provide sufficient information in the report to allow the UK NA to assess the progress of your project against the objectives and activities stated in your application.

Please read this guidance carefully before completing the report and contact the UK NA if you have any questions.

2. Before the end of the reporting period

During your project you will need to keep up to date records regarding the project and its implementation, including details of all activities completed and spend against the project budget. This information should be included in your Interim Report and will be assessed by the UK NA to determine how the project is progressing. It is important to ensure that all information included in the report is accurate and up to date.

The Interim Report is intended as a snapshot of the development of your project so far and as such you should include information on the planned activities to date, any examples of best practice within your project, information on how the project is being managed, details of any difficulties you may have encountered and how these are being addressed, and information to show project expenditure to date and the percentage of the initial pre-financing payment(s) spent to date.

3. After the reporting period for your Project

After the end date of your reporting period, you can begin completing the report template. This should include a comprehensive description of your project activities and the budget spent to date. The following sections outline the steps you need to take to complete and submit your Interim Report.

3.1 Qualitative Guidance

The 2014 Call Interim Report template is a Word document and each section has a heading explaining the information required. Please follow the guidance below as you complete each section of the report:

Project Implementation

You will need to provide a **comprehensive** overview of the activities undertaken to date and describe how you are implementing your project in accordance with your original application and grant agreement. You should also highlight the key activities to be organised for the remainder of the project.

If you have experienced any problems or difficulties with the implementation of your project, you should explain these in the report and outline how they are being addressed and whether they can be overcome by the partnership. It is good practice to share this information to ensure the UK NA is aware of any challenges you may be experiencing and can offer appropriate support. This information will also help the UK NA to support projects in the future.

If any minor changes have been made from the initial application, such as adjusted meeting dates, these should be noted and explained in the report. More significant changes must be approved by the UK NA in writing and should be requested via the formal contract amendment procedure. However, you should still include details of any significant changes in your Interim Report, including an explanation of the reasons for the change and the expected impact on the project. Significant changes will be considered by the NA in line with the contract amendment procedure but may not automatically be approved.

Project Management

In this section you will need to describe how the project partners are contributing to the implementation of the project and any problems or challenges you have encountered. Where

problems or challenges have occurred, please describe the steps you have taken to address them with your partners and the extent to which they have been resolved.

If there have been any changes within the partnership already approved by the NA, please comment on how they are being managed and any impact on the project to date. Equally, if any changes are foreseen in the future, please explain the reasons for these and the likely impacts. Any changes to project partners are considered as a significant change to the project and will need to be reviewed by the UK NA in line with the contract amendment procedure.

In this section, please also give details of any additional activities carried out with your Project Management and Implementation budget, such as local project activities or small-scale dissemination activities (e.g. projects websites, brochures etc.). You should refer back to your application form to identify these. Please do not report on activities relating to the development of Intellectual Outputs, Multiplier Events or Teaching, Training and Learning activities in this section, as these will need to be addressed separately in the sections below.

You should also describe what methods and tools are in place to ensure effective financial management for both the beneficiary (your organisation) and the partners. In particular, please address the following:

- Is data being gathered regarding all project activities, to be added to the Mobility Tool+ once this becomes available?
- Are partners providing regular reports on expenditure? How is this working in practice and what is the frequency of these updates?
- Have there been any problems or issues with financial management? If so, please provide details and describe the steps being taken to address the issues.
- Are all partners aware of the supporting documents they need to retain in case of any future checks or audits (as outlined in Section II.16.2.5 of the Grant Agreement and in Annex III)?

Have payments been made to all partners to date and if so, on what basis have they been made? Please outline the timescales for payments and any conditions to be met by partners before payments are released.

Monitoring Activities

In the second box, please provide details of the monitoring activities you have carried out within the reporting period in order to measure the extent to which the project is achieving its objectives and delivering the activities and results planned at the application stage. Describe the tools and methods

being used to monitor the project and ensure it remains on track, and comment on how these are working in practice.

In particular, please address the following:

- What aspects of the project are being monitored and at what stage?
- What quantitative and qualitative indicators of success are being used?
- How are risks being managed within the partnership?
- Are partners providing regular progress updates? If so, how is this working in practice and what is the frequency of the updates? Where delays or issues are identified, how are they being addressed?
- How is communication working within the partnership and what tools or methods are being used? How often are partners in contact between project meetings? Are there any communication difficulties? If so, how are these being handled?
- Are partnership agreements in place with all partners? Are partners aware of their responsibilities, including those outlined in the grant agreement?

Are the above monitoring arrangements in line with the plans set out in your original application? Where there have been delays or changes, please explain the reasons and confirm what action is being taken.

Transnational Project Meetings

In this section please provide an overview of the Transnational Project Meetings organised so far and those planned for the remainder of the project. For each meeting, please address the following:

- Dates of the meeting
- Meeting location and host organisation
- Topics covered
- Numbers and types of participants attending

If there have been any changes to project meetings or if any changes are foreseen, please provide details and explain the reasons.

Intellectual Outputs

If your project includes Intellectual Outputs approved by the UK NA in Annex II of the grant agreement, please describe progress against each Intellectual Output to date. Please ensure that you refer back to your original application form and work plan and explain any changes to the timing or scope of activities or results. Any changes to project activities are considered a significant change and must be approved in writing by the UK NA, in line with the contract amendment procedure. Unless exceptional circumstances apply, you are expected to implement project activities in line with the original application and any contract amendments already approved by the UK NA.

Please include links to or electronic copies of any outputs produced to date, even if they are currently in draft format and haven't been finalised yet. Where necessary, please provide additional supporting documents, such as any revised work plans already approved by the NA.

Multiplier Events

If your project includes Multiplier Events approved by the UK NA in Annex II of the grant agreement, please describe progress against each Multiplier Event to date. Please ensure that you refer back to your original application form and work plan and explain any changes to the timing or scope of activities. Any changes to project activities are considered a significant change and must be approved in writing by the UK NA, in line with the contract amendment procedure. Unless exceptional circumstances apply, you are expected to implement project activities in line with the original application and any contract amendments already approved by the UK NA.

For each Multiplier Event, please provide details of the location, the host partner, the dates of the Multiplier Event, the total number of attendees (excluding representatives from partner organisations), and number of local / international participants. Where possible, please also provide electronic copies of event agendas and key presentations, along with details of any feedback received from event participants.

Learning/Teaching/Training Activities

If your project includes Learning, Teaching and Training activities approved by the UK NA in Annex II of the grant agreement, please describe progress against each activity to date. Please ensure that you refer back to your original application form and work plan and explain any changes to the timing or scope of activities. Any changes to project activities are considered a significant change and must be approved in writing by the UK NA, in line with the contract amendment procedure. Unless

exceptional circumstances apply, you are expected to implement project activities in line with the original application and any contract amendments already approved by the UK NA.

In this section please provide a description of each Learning, Teaching and Training activity undertaken to date, including the type of activity, the dates of the activity, the location and host partner, and the number of participants. Please also outline the profile of the participants, referring back to your original application.

Dissemination and Use of Project Results

Please describe any dissemination activities undertaken during the reporting period, excluding any Multiplier Events already referred to above. In particular, please address the following:

- What types of dissemination activities have been undertaken to date? What media has been used? Where applicable, please provide links to any project websites, platforms or social media sites to support the report assessment.
- What roles have different partners taken in dissemination activities to date? Are all partners contributing?
- What target groups have been targeted through the dissemination activities?
- Are dissemination activities in line with the plans outlined in the original application? If there have been any changes, please provide details and explain the reasons.

Where possible, please also provide links to or electronic copies of dissemination websites and/or materials, even if they are in draft format and have not been finalised yet.

Other Useful Information

In this section please describe the impact the project is having on the target groups, individuals and organisations involved in the project and whether impacts are at a local, regional, national or EU level.

Please also explain how impact is being measured and whether this is in line with the plans outlined in your application form. Please explain what steps have been taken to date to ensure the sustainability of the project and its potential impacts.

If there is any additional information you feel would be useful to include to support the NA in completing the report assessment, please include it in this section. In addition, if you have any comments for the NA regarding the support and guidance you have received to date or any suggestions for improvement, we would welcome your feedback.

Budget Summary

This section should be completed with the most up to date information you have on your project budget. You should refer to your grant agreement to check the grant amount you were originally awarded, which is outlined in Annex II. Please ensure the financial data entered into the form is accurate and up to date. You should only include details of spend incurred during the reporting period, as is specified in article I.4.2 of your grant agreement.

If you have spent less than 70% of the first pre-financing payment by the end of the reporting period, please explain the reasons for this in the section 'Other Useful Information' mentioned above.

In addition to the budget table within the Interim Report form itself, please also complete the Excel budget table sent to you with your report template. In this table you will need to provide a more detailed breakdown of expenditure against each of the budget headings approved in Annex II of your grant agreement. We recommend that you use the total figures from this table to complete the 'Budget Summary' in the report template itself. In any case, please check carefully to ensure that both tables are completed in full, are correct and up to date, and that the figures are consistent in each.

4. Completing and Submitting your Report

Please be aware that you cannot submit the Interim Report before the end date of the reporting period, as specified in your grant agreement. Please ensure that the information you include in your report covers the period from the start date of your project up to the end of the Interim Report reporting period.

To complete the Interim Report you will need to access the report template following the instructions in the notification email. You must complete all relevant sections of the report form. When you have done this, you will need to submit your Interim Report in the following way:

- Ask your legal representative to sign and date the signature page by hand
- Scan the completed report form, including the completed signature page
- Complete the supporting Excel budget table
- Where relevant, include links to supporting documents within the report form or attach electronic copies of the documents
- Email the scanned (signed) report form along with the supporting documents mentioned above to your Project Officer, including the following as the subject of your email: '*Your*

project reference number – Interim Report'. Please also copy this email to:
erasmusplus@ecorys.com

5. After Submitting your Report

The UK NA will send you an email to acknowledge the receipt of your Interim Report within two working days and will request any missing data following submission, as necessary.

The assessment and outcome of your Interim Report and any further payment (if applicable) will be completed within 60 calendar days from receipt of the signed (scanned) report by email. However, this period will be suspended if the UK NA needs to request any further information or supporting documents before finalising the assessment. If any additional information is required you will be notified by email.

The Interim Report will be assessed taking into account:

- The extent to which the project is being implemented in line with the approved grant application (and any contract amendments already approved by the NA)
- The quality of the partnership, communication and cooperation arrangements
- The quality of project and financial management
- The quality of project activities and interim results
- The extent to which the project has been implemented in line with the programme and contractual rules

Following the assessment of your report, the UK NA will send you a summary of feedback which may include recommendations and/or action points for you to complete to support the successful implementation of your project.

6. Contacts

If you have any questions about your Interim Report you should first contact your Project Officer directly. You can also contact the Erasmus+ helpline on 0121 212 8947 or email erasmusplus@ecorys.com. The helpline is open Monday to Thursday, 9am to 5.30pm (UK time) and 9am to 5pm (UK time) on Fridays.