



Project no. **224609**

Project acronym: **Dehems**

Project title: **Digital Environment Home Energy Management Systems**

Instrument:					
<i>Please tick</i>	CA	STREP ✓	IP	NOE	

ICT - Information and Communication Technologies Theme

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Dissemination Level		
PU	Public	✓
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including the Commission Services)	
CO	Confidential, only for members of the consortium (including the Commission Services)	



Project Handbook

DEHEMS: Digital Environment Home Energy Management Systems

Prepared by: Martine Tommis, MDDA

Version: V14

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Version Control

Version	Date	Author	Changes
13	Aug 10	Martine Tommis	Explanation of Uses of Resources :Table 3.8 Addition of information on data protection requirements
14	Jan 11	Martine Tommis	Updated in line with changes to DoW, timescales and NEF system

Disclaimer Statement

Whilst every effort has been made to ensure the accuracy of the information supplied herein, Manchester City Council cannot be held responsible for any errors or omissions. Unless otherwise indicated, opinions expressed herein are those of Manchester City Council and do not necessarily represent the corporate views of the authority. The handbook does not replace the European Commission 7th Framework documentation and the contents are provided for information and guidance only. Partners are advised to consult source documentation available on the Cordis website http://cordis.europa.eu/fp7/home_en.html

Copyright Statement

Manchester City Council grants permission for the use this material as part of the Dehems and for the printing of copies. A copy of this notice must be appended to any copy of material taken. The express permission of the copyright holder must be obtained for any other use of this material.

1. The Partnership

The Digital Environment Home Energy Management System Project (Dehems) is funded under the Seventh Research Framework Programme.

Dehems is made up of 12 partners:

- Manchester City Council, UK
- Technical University Cluj-Napoca, Romania
- Clicks and Links Ltd, UK
- Hildebrand Technology Ltd, UK
- Bristol City Council, UK
- University of Rousse "Angel Kanchev" Bulgaria
- Birmingham City Council, UK
- University of Coventry, UK
- University of Salford, UK
- Energy Agency Plovdiv, Bulgaria
- Obshtina Ivanovo Municipality, Bulgaria
- Institute e-Austria Timisoara, Romania

2. Project Vision and Objectives

“DEHEMS will develop & implement a granular and scalable ‘energy use performance model’ giving real time individual & comparative information on household emissions and energy performance. This will inform wider actions by providing recommendations and choices to change customer behaviour”.

The project website is located at www.dehems.eu.

The project intranet is located on www.huddle.net - contact lead partner for access.

3. Project Structure

4. The Executive Committee

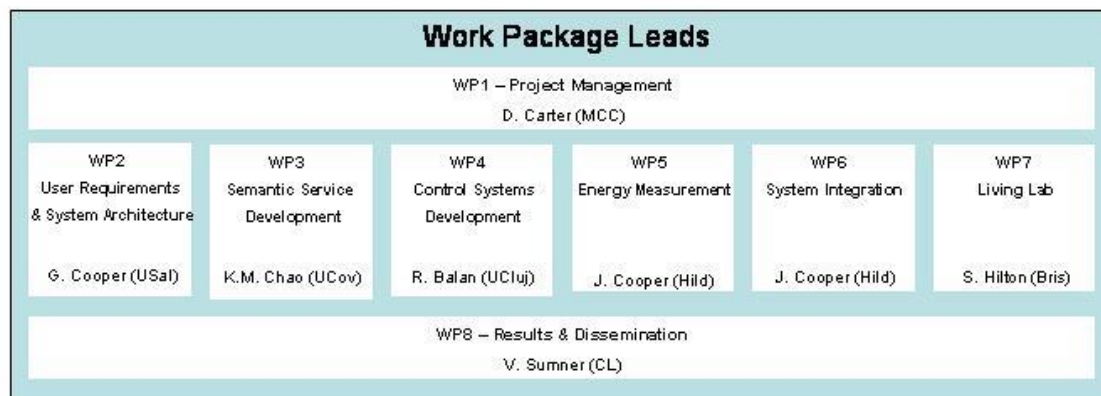
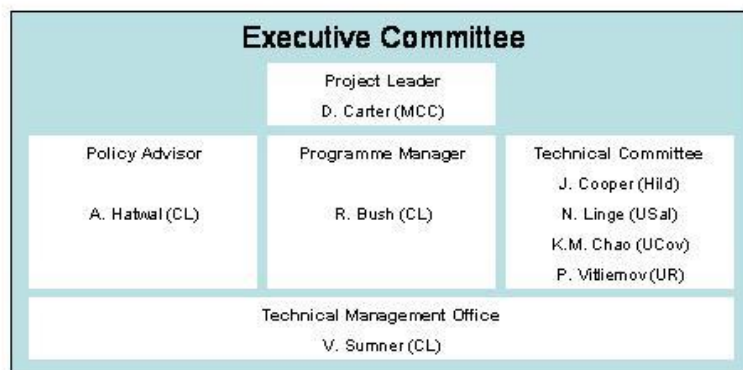
The Executive Committee (XCom) is responsible for RTD Project Management and quality assurance throughout the project. It is made up of key representatives of the project and represents the different types of functional organisations involved in the project:

- Project Leader (MCC: Dave Carter; Martine Tommis)
- Programme Manager (Clicks and Links – Richard Bush)
- Technical Committee (Hildebrand: Josh Cooper)
- Policy Advisor (Clicks and Links: Vin Sumner)
- Work Package Leaders: (Dr K Chao; Grahame Cooper; Vin Sumner)

The executive will meet monthly to review the overall project progress reports and plans, review risks, resolve conflicts, make key decisions and control the financial aspects of the project. The Executive Committee's operation is transparent with all agenda's, reports, minutes and decisions being available to all Partners.

5. Project Governance

The Xcom is the main project coordinating body is made up of the User Group and Technical Group members. Below are the main representatives of on the groups – other representatives from each partner may attend where relevant.



The technical coordination role is focused on drawing together the technical work and the Living Labs elements of the project in to a cohesive whole.

6. Work packages

There are eight work packages (WPs)

Work Package 1: Project Management (led by MCC)

Project management tasks will fulfil contractual and financial management responsibilities in the project. Includes non-RTD elements of consortia management. All partners have role in management of their own project affairs.

Work Package 2: User Requirements & System Architecture (led by USal)

User requirements will be gathered via surveys to inform the user requirements. MCC; CL; Hild; Bris; UCov; EAP; IVOB

Work Package 3: Semantic Services (led by UCov)

Create a detailed view of household preferences in energy resource management services and views on management interfaces. UCluj; CL; Hild; USal; leAT

Work Package 4: Control Systems Development (led by UCluj)

Implement a control system for the meter. CL; Hild; UR; USal

Work Package 5: Energy Measurement (led by Hild)

Creating an energy meter along with data capture. UCluj; CL; UR; USal; leAT

Work Package 6: System Integration (led by Hild)

Bring the semantic sub-systems together and build common components. Establish standards for coding; maintain a code repository and system design. CL; USal; leAT

Work Package 7: Living Labs Behaviour Change Research (led by Bris)

Establish a series of Living Lab's (participant households) and generate user evidence to inform system development and evaluation, including a knowledge base. Birm; USal; EAP; IVOB

Work Package 8: Evaluation & Dissemination (led by C&L)

The focus is evaluating the RTD effort against its objectives, building on the ongoing review and evaluation incorporated in other WPs along with dissemination and exploitation. Hild; Bris; UR

7. Project Timescale

The project commencement date is 1st June 2008. The project length is 38 months. The project close date is **31st July 2011**. All expenditure must be cleared by this date. In order to achieve this, partners will need to ensure that final payments/invoices are submitted to the financial systems in advance of this date.

Work package No ¹	Work package title	Type of activity ²	Lead ben no. ³	Lead ben. short name	Person-months ⁴	Start month ⁵	End month ⁵
WP1	Project Management	RTD	1	MCC	38.32	T0	T0+38
WP2	User Requirements & System Architecture	RTD	12	USal	35.99	T0	T0+37
WP3	Semantic Services Development	RTD	10	UCov	52.43	T0	T0+37
WP4	Control Systems Development	RTD	2	UCluj	35.65	T0	T0+37
WP5	Energy Measurement	RTD	4	Hild	32.44	T0+3	T0+38
WP6	System Integration	RTD	4	Hild	39.22	T0	T0+37
WP7	Living Labs Behaviour Change Research	RTD	5	Bris	92.58	T0	T0+38
WP8	Evaluation and Dissemination	RTD	3	CL	36.52	T0	T0+38
	TOTAL				363.15		

¹ Work package number: WP 1 – WP n.

² Please indicate one activity per work package:

RTD = Research and technological development; DEM = Demonstration; MGT = Management of the consortium

³ Number of the participant leading the work in this work package.

⁴ The total number of person-months allocated to each work package.

⁵ Measured in months from the project start date (month 1).

8. Contact points

Project Office: Financial and Contract Management

Manchester City Council: Key Personnel

Project Management:

Martine Tommis: m.tommis@manchesterdda.com +44 (0) 161 241 8205;

Mob: +44 (0) 7717 660966; Skype ID: mdda_martine

Financial Management:

Julie Boulton: j.boulton@manchesterdda.com +44 (0) 161 241 8209;

Manchester City Council, Manchester Digital Development Agency

Lower Ground Floor, 117-119 Portland Street. Manchester. M1 6ED, UK

Programme Management

Clicks and Links: Key Personnel

Richard Bush: richard.bush@clicksandlinks.com +44 (0) 7870 593730

9. Project Publicity

All publicity must be approved by the project coordinator (MCC) prior to publication.

If the document does not meet the EU requirements for publicity then it is possible that the cost of the production of the material i.e. actual costs and effort could be removed from a financial claim. A copy of all publicity and publications is required by the project coordinator (MCC) for retention.

The EU requires logos and/or a statement to be added for **ALL** project publicity and documents.

Project Website

There is a particular requirement for all web based developments:

The home page of the website should contain the generic European flag and the FP7 logo which are available in electronic format at the Europa website (logo of the European flag: http://europa.eu/abc/symbols/emblem/index_en.htm ; logo of the 7th

FP: http://ec.europa.eu/research/fp7/index_en.cfm?pg=logos). The area of activity of the project should also be mentioned.⁶

Logos

The three logos relevant to the project are Dehems; EU and Framework 7.

The logos can be downloaded in different formats. The JPG format allows you to use the image directly in documents by using copy and paste or on the web. The vector format or EPS (Encapsulated Postscript) is for pre-press i.e. publishing.

Copies can be downloaded from the links below or the Dehems Intranet System.

Dehems Logo



European Union Logo



The EU provides a graphic manual intended to help users reproduce the European emblem correctly.

- Full colour documents: Yellow on blue
- Reduced colour documents: White on blue
- Black and white documents: Black on white

http://europa.eu/abc/symbols/emblem/download_en.htm

Framework 7 Logo



The FP7 logos are on white background. When using them on a coloured background they should be placed on a white rectangle with rounded corners as shown at left. This rectangle is part of the design in the eps and gif versions (invisible on a white background).

⁶ Dehems is a Cooperation project

FP7 is split in to different areas - Cooperation, Capacities, Ideas, People - and Euratom. Dehems is a **Cooperation** project. There are different logos each of the areas. The full colour version for Cooperation is as above. The ordinary FP7 logo is the same but without the text.

- Full colour
- Black and white

Download: FP7 Logos in eps, jpg and gif formats

http://ec.europa.eu/research/fp7/index_en.cfm?pg=logos

Publications

This is particularly relevant to any scientific publications. Article 2.30 of the DEHEMS contract states: *All publications or any other dissemination relating to foreground shall include the following statement to indicate that said foreground was generated with the assistance of financial support from the Community:*

The research leading to these results has received funding from the European Community's Seventh Framework Programme FP7/2007-2013 under grant agreement n° No224609

Remember that failure to comply with the publicity requirements of the EU could result in the non-payment of the man months claimed to produce the work.

10. Financial Guidelines

Introduction

A full copy of the "Guide to Financial Issues relating to FP7 Indirect Actions" is located at ftp://ftp.cordis.europa.eu/pub/fp7/docs/financialguide_en.pdf Other FP7 documentation can be found at www.finance-helpdesk.org and www.meeusfp7.eu. If you have any queries regarding project finances you are advised to contact the lead partner, Manchester City Council.

RTD vs. MTG

Research and development activities are funded to 75% of project costs by the EU. Management is funded 100%. WP1 activities are MTG ONLY and covers tasks which

fulfill contractual and financial management responsibilities in the project. No other activities should be claimed under MTG.

Booking and Accounting Systems

The Financial Helpdesk (www.finance-helpdesk.org) is an EU project which aims to provide help and information regarding FP7 projects. It offers some helpful information and advice. Below is an extract from their website <http://www.finance-helpdesk.org/front/ShowArticle.aspx?ItemID=1186#Problem> which highlights issues relating to accounting procedures. It contains advice worth noting for all partners.

Potentially major bookkeeping problems associated with FP7 Eligible Costs:

A major change in FP7 is that it is an explicit requirement for the first time that all charges (direct and indirect) to the project must appear in the organisations book of accounts. It is how they are actually recorded that determines their eligibility. For example if your accounting department automatically records travel as overhead, they are not a direct chargeable cost. As previous years books of accounts will be closed by the end of a specific project and thus unalterable, any such deviations cannot be corrected as was the case in previous Framework Programs.

We therefore recommend that you ensure your cost recording system is compliant with these new more stringent rules and perhaps implementing changes so things such as travel can be split depending whether it is classed as a direct cost or not. One also must remember that items can only be recoded once.

In our opinion, these changes have not been highlighted sufficiently and with the removal of need for most Audit Certificates, such errors may not be picked up until subsequent external audits. Thus organisations may have large future liabilities they are unaware of.

NEF System – Form C / Payment Process

The NEF system (Negotiation Forms) is an online tool used by the EU. It is designed to be a cradle to grave approach for projects - covering expressions of interest, project applications, claims, payments and eventually a repository for guidance etc.

You should prepare your claim and submit to MCC for the agreed deadline – this will then be verified by MCC project staff.

The process for using this online tool is as follows:

- The Commission issue participant and co-ordinator access keys for NEF online tool
- MCC inform partners of participant access key
- Partners (including MCC) input Form C financials together with upload of Certificate on Financial Statement (if cumulative claims exceed 375K euros)

- Coordinator signs off and submits
- Commission completes verification process and accepts claim
- Partners download verified Form Cs in pdf format, sign and send to MCC
- MCC submits all hard copies of project documentation back to EC
- Await payment

Partner Bank Account

It is recommended that the bank account used for the project is used exclusively for the project - the coordinator must be able to identify the dates/figures related to payments. If an existing account is used, the accounting methods must comply with the above i.e. you should be able to identify the transactions and any interest accrued. Any interest accrued on monies held by any partner will be deducted from their total grant.

Mailing Documents To Lead Partner

Partners are advised to use a courier service to mail any legal or signed documents.

You are also advised to keep a copy for your own records. This should include a signed version in the event of the documentation going missing at a future date.

MCC also request that you provide **2 signed** versions to MCC for all documentation and claims. In this way a version is retained again in the event of the original “disappearing”.

This advice is a result of experience of working on other EU projects where problems have arisen due to the absence of signed documentation.

The Form C – Claim Form

Form C is the form on which partners should submit their claims. A spreadsheet (Excel) version is available from Julie Boulton: j.boulton@manchesterdda.com +44 (0) 161 241 8209.

All parts of the Form C should be completed. If you do not have an organisational stamp, it is suggested that you write “NO STAMP”. Make sure you use the correct beneficiary no. and Participant Shortname. The EU can reject your claim if these details are not correct. Ensure that you write in the rates applicable to your organisation for indirect and direct costs.

Who Should Sign The Form C?

The Commission have stated that this must be signed by the authorised person(s) within the beneficiary's organisation, as stated in the Annex II of the Grant Agreement.

"Form C, must be and the certificates on the financial statements and on the methodology must be signed by an authorised person of the auditing entity, and the originals shall be sent to the Commission." FP7 Grant Agreement - Annex II. - General conditions Article II.4./ 5. (ftp://ftp.cordis.europa.eu/pub/fp7/docs/fp7-ga-annex2-v2_en.pdf).

The authorised person is the person who signed the Consortium Agreement with MCC. MDDA can supply details for your body i.e. your LEAR.

Segregation of Financial Duties

In MCC's experience, it is advisable that the Form C and supporting evidence should be checked and verified by an independent person. Not only should this assist with eliminating any errors, it could assist the audit process at a future date. MCC will ask another department to verify the claim document and sign to say that this has been carried out in line with normal financial rules of the organisation. We would recommend this approach to partner organisations.

Supporting Documentation

Partners must ensure that they retain a full audit trail of all documentation for any expenditure made and claimed by the project. This includes match funding which should be treated identically to any other expenditure in terms of evidence retained. Procurement evidence is addressed in that section.

Examples of the types of evidence required by category are as follows:

Personnel Costs	<ul style="list-style-type: none"> • Employment contracts (or other independent/legal justification of personnel costs claimed) • Ledgers / accounts, payroll records / bank statements • Time sheets • Detailed breakdown and justification of the productive hours denominator used for calculation of hourly rates (personnel and overhead) costs and the back-up documentation • Analysis, reconciliation and summary of final breakdown of overhead costs (by category of expense) charged to the project(s)
Overheads costs	<ul style="list-style-type: none"> • Full documentation concerning the calculation of the overhead costs and the back-up documentation thereto • Analysis, reconciliation and summary of final breakdown of overhead costs (by category of expense) charged to the project(s)
Equipment / Consumables	<ul style="list-style-type: none"> • Invoices • Proof of payment • Procurement documentation • For rented equipment: Rental contract, inventory list of the equipment; proof of the investment values of the rented equipment
Travel expenses	<ul style="list-style-type: none"> • Invoices • A report, records, minutes etc. indicating purpose and participants of the meetings / events
General Ledger / Management accounts	<ul style="list-style-type: none"> • Extracts and reconciliations of costs claimed back to underlying accounting records/general ledger to verify costs claimed and their eligibility • Bank statements
Auditor certificates	<ul style="list-style-type: none"> • Copies of any auditor certification statements issued with a claim for cost reimbursement

Direct and Indirect Costs

Direct costs are those costs which are directly related to the delivery of a project and can be clearly identified and justified by your normal accounting rules and principles. For a cost to be classed as a potential eligible direct cost, the cost has to have been incurred and shown in your accounts and financial reports with an audit trail between the financial statement and the ledger. For example, the purchase of an item, travel expenses or payment of a salary.

Indirect costs are those costs which are not directly related to a project, for example, heating and lighting, social security. **Note that subcontracting is specifically excluded from any indirect costs.**

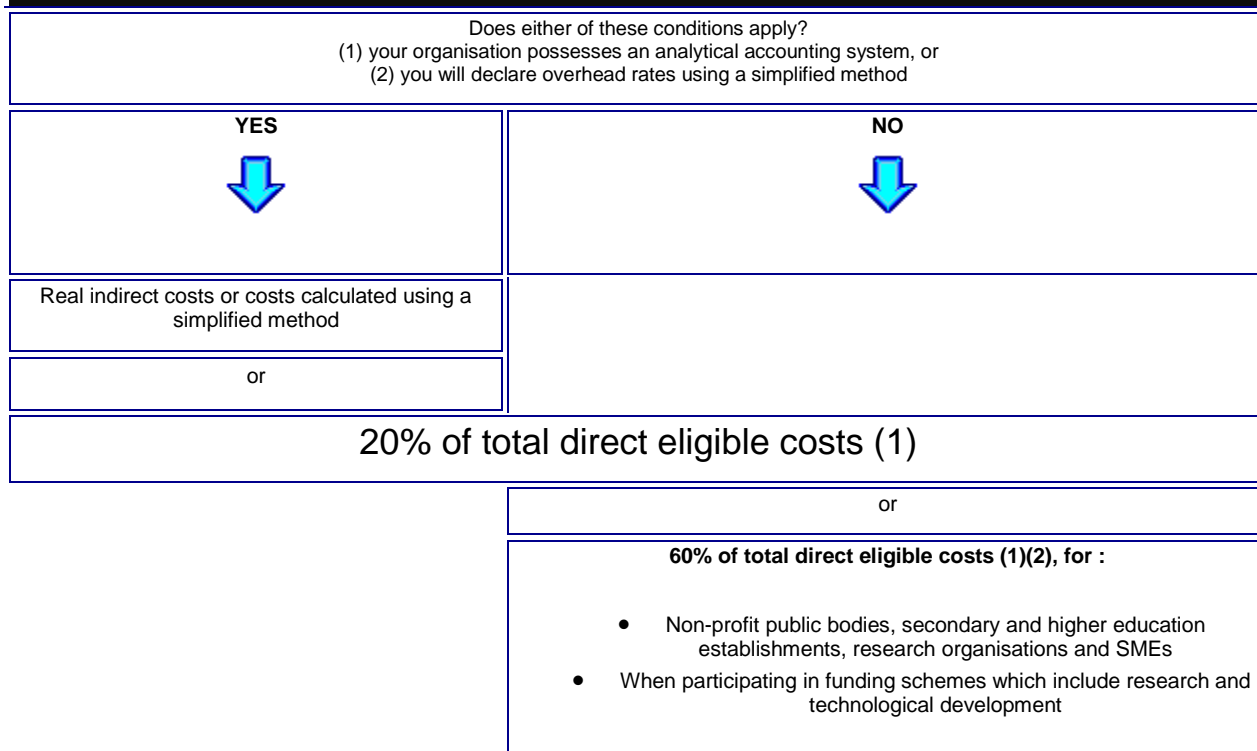
The Commission defines indirect costs as: ***all those eligible costs which cannot be identified by the participant as being directly attributed to the project but which can be identified and justified by its accounting system as being incurred in direct***

relationship with the eligible direct costs attributed to the project. They may not include any eligible direct costs.

In FP7, these costs may be calculated according to one of the following methods (but the Commission's guidance indicates that where you have analytical accounting and can identify your costs, you should use justified actual costs).

- **Real indirect costs:** Real indirect costs incurred in direct relationship with the direct eligible costs attributed to the action calculated using an analytical accounting system
- **Simplified method:** A participant may use a simplified method of calculation of its full indirect eligible cost at the level of its legal entity if it is in accordance with its usual accounting and management principles and practices. Use of such a method is only acceptable where the lack of analytical accounting or the legal requirement to use a form of cash-based accounting prevents detailed cost allocation. The simplified approach must be based on actual costs derived from the financial accounts of the period in question.
- **Standard flat rate:** A participant may opt for a flat-rate of 20% of its total direct eligible costs, excluding its direct eligible costs for subcontracting and the costs of reimbursement of resources made available by third parties which are not used on the premises of the participant.
- **Special transition flat rate:** Non-profit public bodies, secondary and higher education establishments, and research organisations and SMEs, which are unable to identify with certainty their real indirect costs for the project, when participating in funding schemes which include research and technological development and demonstration activities may opt for a flat-rate of 60% of the total direct eligible costs¹ excluding costs for subcontracting and the costs of reimbursement of resources made available by third parties which are not used on the premises of the participant. If these participants change their status during the life of the project, this flat rate shall be applicable up to the moment they lose their status.

Indirect Costs - Decision Tree



Article 11.15 (Annex II of the GA) refers to the use of 60% only *where there is a lack of analytical accounting and they are unable to identify with certainty their real indirect costs for the project.*

It should be noted that should you choose to use a standard flat rate and the auditor deems that you have an analytical system and can identify actual costs, you may be required to repay grant.

You are recommended to read **Guide to Financial Issues relating to FP7 Indirect Actions** ftp://ftp.cordis.europa.eu/pub/fp7/docs/financialguide_en.pdf

Annex II 11.15 Identification of direct and indirect costs – also deals with the topic. Note that reference is made to “a fair apportionment” of the overall overheads (11.15.2).

Excerpt from in the FP7 Guide is as follows:

Methods of calculation of indirect costs:

- Under FP6, direct and indirect eligible costs charged by a participant had to be declared according to a cost reporting model. There were three cost models available.
 - Full cost model (FC), where all the eligible actual costs (direct and indirect) were charged by the contractor.
 - Full cost with flat rate model (FCF), where actual direct cost and a flat rate (20% of direct cost minus subcontracting) for indirect cost were charged by the contractor.
 - Additional costs (AC) basis, where the direct additional eligible costs and a flat rate (20% of additional direct costs minus subcontracting) were charged by the contractor.
- Under FP7, there are no cost reporting models. The beneficiaries must declare their actual costs (with the possibility for a beneficiary to use average personnel costs if this is approved by the Commission).
- Optionally, beneficiaries may opt to declare their actual direct costs plus a flat rate for indirect costs of 20% of the direct costs (minus subcontracting and third party costs not incurred on the premises of the beneficiary).
- Also, a specific flat rate is foreseen for certain types of organisations in order to assure the transition between the old AC model to a real indirect cost method.
- In FP7 all departments, faculties or institutes which are part of the same legal entity must use the same system of cost calculation (unless a special clause foreseeing a derogation for a particular department/institute is included in the GA).

It is also useful to look at the FP7 document **Certificates Issued By External Auditors Guidance Notes for Beneficiaries and Auditors**. 6.5 Overheads/Indirect Costs, p29. The document gives guidance as to the auditor's requirements, in particular the documents and evidence the beneficiary is expected to provide.

ftp://ftp.cordis.europa.eu/pub/fp7/docs/guidelines-audit-certification_en.pdf

A snapshot of the advice is from the guidance is as follows:

- Analytical Method: A detailed breakdown of the components of the overhead cost. Reconciliation to accounting records. The individual cost items should be traceable to the beneficiaries accounting records. There is no reckless or excessive expenditure. No direct costs are included
- Simplified Method: Estimates clearly described. No evidence of an analytical accounting system (separating costs in to different types). Best information available – e.g. data to allocate power consumption in the floor space based on a conservative estimate (because real data is not available).

Remember that accounts are submitted and closed every year –make sure that you are recording costs correctly in your books of account as they cannot be retrospectively corrected.

VAT

VAT is not an eligible cost that can be reimbursed. Where VAT is visible on an invoice, the Commission will not want to reimburse it. Where no VAT is visible, assume that the Commission will reimburse the full amount of the invoice (i.e. if it doesn't say "VAT", then there is no VAT). The Commission's refusal to reimburse VAT is difficult for organisations that are not registered for VAT and hence cannot reclaim VAT.

Bonus Payments and Directors Salaries

A number of SME partners have asked bonuses (paid in addition to salary) are eligible expenditure under FP7 projects. The response from the Commission was as follows:

Article II.15 of the Grant agreement which you can find at page 38 and 39 of the Guide to Financial Issues relating to FP7 Indirect Actions available at:

ftp://ftp.cordis.europa.eu/pub/fp7/docs/financialguide_en.pdf

reads:

- *Personnel costs should reflect the total remuneration: salaries plus social security charges (holiday pay, pension contribution, health insurance, etc.) and other statutory costs included in the remuneration*
- *Personnel must be remunerated in accordance with the normal practices of the beneficiary.*

Therefore the answer is YES bonuses are eligible expenditure under FP7 projects provided:

1. They can demonstrate the bonuses are normal practice in the company. For instance these are written in the employment contracts and apply to everybody not only those working in EU funded projects;
2. The bonuses are properly recorded in the financial books of the company and eligible for national taxes.
3. The quantities are not extravagant - in the past figures received have been judged as being excessive.

Payments

Payments to partners will be made by Manchester City Council (MCC) direct to Partners bank accounts. Payments are received and paid in Euros.

A single pre financing payment was made at the start of the project of 35%. 5% of this was retained by the Commission as the Guarantee Fund. This will be paid on final payment.

Financial responsibility & Guarantee Fund

FP6 had collective financial liability – in FP7 this has been replaced by In FP7 this replaced. Whilst there is collective responsibility for activity and delivering the project, each partner is responsible for the management of their own finances. To underwrite this, a Guarantee Fund is established and operated by the Commission. Each participant makes a contribution to the fund of maximum of 5% of the EC contribution, to be returned at the end of the project (assuming that the individual partners and the project as a whole meet the requirements of the Commission).

€ Conversion

Contracts, funding, payments and cost statements in FP contracts are all in EUR. Several EU Member States and all Associated States use currencies other than the EUR.

MCC as lead partner has determined that partners in Dehems should use the rate applicable on the first day of the month following the end of the reporting period for euro conversion.

The daily exchange rates are fixed by the European Central Bank (ECB) and may be obtained <http://www.ecb.int/stats/eurofxref/> - the date for the rate of the first day of the month following the reporting period is located here for all currencies.

Beneficiaries with accounts in EUR shall convert costs incurred in other currencies according to their usual accounting practice. Invoices in EUR should be submitted as they stand.

NB: Where the conversion date is a non-working day (Saturday or Sunday) then next working day is used i.e. the Monday.

Participation Identification Code

This is the unique code identifying each partner. It is required to on the Form C.

http://cordis.europa.eu/fp7/urf-pic_en.html

Beneficiary No	Name of Organisation	PIC Number	VAT Number
1	Manchester City Council	999583837	GB149151958
2	Technical University of Cluj-Napoca	999897244	RO13847750
3	CLICKS AND LINKS LTD	999626614	GB757921396
4	HILDEBRAND TECHNOLOGY LIMITED	999615847	GB872434711
5	Bristol City Council	999590045	GB139563445
8	UNIVERSITY OF ROUSSE "ANGEL KUNCHEV"	999842633	BG1181001778
9	BIRMINGHAM CITY COUNCIL	999624480	
10	University of Coventry	999612161	GB487676869
11	THE CENTRE SA	999650670	BE0860235293
12	THE UNIVERSITY OF SALFORD	999829441	GB712463556
13	ENERGY AGENCY OF PLOVDIV	998922976	N/A
14	OBSHTINA IVANOVO	998882527	N/A
15	INSTITUTUL E-AUSTRIA TIMISOARA	999624674	RO15076287

Exceeding Budget Lines

The project budget as outlined in Annex 1 Description of Works forms part of the EU contract – partners cannot exceed their allocated budget / budget lines. You must discuss any potential issues with MCC as soon as possible. Note that the NEF session will not allow data to be input which does not fall within the set budget.

Budget Amendments

The Commission states *“An amendment to the Grant Agreement will be necessary in all cases if the budget transfer arises from a significant change in Annex I.”*

The GA (Annex II 5.2) also states *“Beneficiaries are allowed to transfer budget between different activities and between themselves in so far as the work is carried out in Annex I”*.

The keywords are “significant” and “Annex I”. How big is the change and how does it effect the delivery of the project.

Budget amendments should be discussed with the Lead Partner (Manchester City Council) prior to a change being made. Unauthorised changes could result in grant being lost to that partner.

Audit Requirements

An audit certificate is required for any claim or cumulative value of a number of claims reaches a threshold of €375,000 or above.

“Match Funding”

The budget allocated to each partner shows the total project costs INCLUDING the element for co-financing or “match funding” from the organisation. There is no match funding for the project management element of the project i.e. WP1 = 100% funding for all partners. The research element, RTD is funded to 75% of the total. For each 75 cents spent, the partner must supply the remaining 25 cents from other sources.

The match funding source must be from a “clean” source. Partners should ensure that any match funding is from any other European funding or already used as match funding on another project. One EU project CANNOT match another Commission funded project.

The evidence supplied for the match must be as robust as evidence of direct expenditure. An auditor should not be able to see what was match and what was spend. It should be submitted as part of the claim just as any other expenditure. The monitoring of budgets should take account that the amount for actual spend may be less than stated – i.e. an element of match is required. The match funding should come from activity related to the project. If it includes goods or services, these should be used on project activity. For example, if a third party is supplying equipment the value can be used as match – they would need to give you a statement of the commercial value. Note they are not acting as subcontractors in this instance. However if they were providing the equipment AND installing it on our behalf they would be.

If, for example, you are using an existing website, you would need to show how the site was procured; this includes the tender or selection process. See the section on procurement. The bottom line is that match evidence should be as robust as any expenditure made by the project.

A third party beneficiary can provide match. The match element should be **separate** to the subcontracted effort. For example, resources additional the subcontract such as the salary of an additional person. Timesheets are required for any salaries used as match.

Subcontractors can not provide match funding - According to II.7 the subcontractor is a third party which has entered into an agreement on **business conditions** – (see *Working with Subcontractors* below).

Where resources are made available by third parties free of charge, they are not regarded as a receipt to the project (i.e. income) if their use is at the discretion of the beneficiary's management (Annex II.14.2 and 11.17.ii).

WP 1- Management – Eligible Items

Note that **ONLY** activities relating to management of project affairs – financial claims, partner meetings, Xcom meetings can be claimed under WP1 (100% funded). Items such as technical coordinator qualify as RTD work.

Recording “Effort” and Time Commitments: Timesheets

It is a condition for reimbursement of personnel costs in FP7 that employees complete a timesheet.

If timesheets are not prepared and submitted in accordance with the EC regulations, then the personnel costs cannot be charged and the shortfall in salaries and overheads will need to be met from the partners own budgets.

To qualify for reimbursement the following conditions must be fulfilled:

- Personnel must be directly hired by the beneficiary (= the Organisation signing the EU contract)
- Personnel must work under the sole technical supervision and responsibility of the beneficiary
- The beneficiary may include in its personnel costs “permanent or temporary employees”, who have permanent or temporary working contracts.
- Personnel costs should reflect the total remuneration: salaries plus social security charges
- Only the hours worked on the project can be charged. Working time is the total number of hours worked, excluding holidays, personal time, sick leave, or other allowances.
- **Note that all hours claimed must be able to be verified in a reliable manner.**

Timesheets are required to:

- support the allocation of all Personnel costs to an award (including those staff who are 100% FTE)
- back up the allocation of time (and cost) across the different areas of activity covered by an award (e.g. time spent on Management, Research)
- allow the Commission to reconcile the cost charged to a project back to total hours worked by an individual (including time spent on non-EU projects).

The EC also expects to see the hours spent on the project it is funding set against total ‘productive hours’, which it defines as total working time ‘excluding holidays, personal time, sick leave, or other allowances’. This does not mean that an individual’s time spent on

work other than that funded by the Commission needs to be recorded in great detail, although the Commission does need to see that the total 'productive hours' tally with the figures used to generate daily/hourly/monthly rates, meaning that figures need to be included to demonstrate that the time spent on other productive activity, plus that spent on FP7 projects, adds up to the full working year used for calculations.

Therefore the timesheet should include other non-Dehems work as well as holiday and sickness. A timesheet template is available on the share point system and an example given below. You must work out the days per month worked in total (assuming a full time post). You should relate the number of hours on your timesheet to the number of person hours/days that are allocated to the work packages for to your effort on the project.

Work package hours are submitted as part of the reporting procedures. Another project experienced problems where high rates of individual remuneration were submitted in the original bid but the work was delivered by lower salaried staff. Using lower paid staff increased the work package hours. The Commission was unhappy that effort increased. Their view was is that the bid was submitted using staff of a particular calibre. That effort increased by the use of lower paid staff, was in their view, a deviation from the contract.

Retain the original timesheet for your own files.
--

Days Worked Per Month/Productive Hours

The timesheet is calculated monthly. The normal days per month worked per is 20 days, however it does depends how many working days there are in a particular month. To calculate the average:

- 365 days per year
- minus public holidays
- minus weekends
- minus annual leave entitlement

The result is your normal working days per year. Divide by 12 for the average.

DEHEMS EXAMPLE TIMESHEET



TIMESHEET

MONTH/YEAR

June 2008

PARTNER ORGANISATION

Partner Name (as per Dehems contract)

WEEKLY CONTRACTED HOURS

35

NAME

Staff Member Name

No ANNUAL LEAVE DAYS

30

JOB TITLE

Staff Post Name

No ANNUAL PUBLIC HOLIDAYS

8

SIGNATURE

DATE	ACTIVITY DETAIL	No OF HOURS														
		MGT		RTD						TOTAL DEHEMS	TOTAL OTHER ACTIVITY	PUBLIC HOLIDAYS	ANNUAL/SPECIAL LEAVE	SICK LEAVE	GRAND TOTAL HRS	
		WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8							
MON	2 Other Activity									0	7					7
TUE	3 Other Activity									0	7					7
WED	4 Dehems Preparation for meeting	3.5								3.5	3.5					7
THU	5 Dehems Meeting	7								7	0					7
FRI	6 Grant agreement management	3.5								3.5	3.5					7
MON	9 Other Activity									0	7					7
TUE	10 Other Activity									0	7					7
WED	11 Updaing project intranet/meeting preparation								7	7	0					7
THU	12 Other Activity									0	7					7
FRI	13 Grant agreement work	3.5								3.5	3.5					7
MON	16 Annual Leave									0	0	7				7
TUE	17 Annual Leave									0	0		7			7
WED	18 Annual Leave									0	0		7			7
THU	19 Annual Leave									0	0		7			7
FRI	20 Annual Leave									0	0		7			7
MON	23 Other Activity									0	7					7
TUE	24 Other Activity									0	7					7
WED	25 Consortium Agreement	3.5								3.5	3.5					7
THU	26 Consortium Agreement	3.5								3.5	3.5					7
FRI	27 Consortium Agreement	3.5								3.5	3.5					7
MON	30 Consortium Agreement	3.5								0	0				7	7
TOTAL		31.5								35	70					147

AUTHORISED BY

NAME

Line Managers Signature

JOB TITLE

Line Managers Name

SIGNATURE

DATE

Submission of Record of Effort with Claim (Person Months)

Each partner must submit with their claim a record of there hrs worked. It is the partner's responsibility to complete the timesheet and ensure accuracy and correct signatures. You need to maintain a record of effort based on MONTHS. To do this you must use the hours to calculate Person Months – the number of hours per month depends on how many hours you work per month – see **Days Worked per Month/Productive Hours** above.

<i>CLAIM PERIOD 2</i>	1 December 2008 - 31 July 2009
<i>PARTNER ORGANISATION</i>	

TIMESHEET SUMMARY

<i>CLAIM PERIOD 2 MONTH</i>	<i>No OF PERSON MONTHS</i>								<i>TOTAL DEHEMS</i>
	<i>MANAGEMENT</i>	<i>RTD</i>							
	<i>WP1</i>	<i>WP2</i>	<i>WP3</i>	<i>WP4</i>	<i>WP5</i>	<i>WP6</i>	<i>WP7</i>	<i>WP8</i>	
December 2008									0
January 2009									0
February 2009									0
March 2009									0
April 2009									0
May 2009									0
June 2009									0
July 2009									0
TOTAL	0	0	0	0	0	0	0	0	0

COMPILED BY

NAME

AUTHORISED BY

NAME

JOB TITLE

SIGNATURE

DATE

Efforts for the Full Duration of the Project (B1.3.6)

The description of works (p72) contains an effort table for the life time of the project. This forms part of the contract with the EU. Partners should ensure that they do not exceed the stated work package months detailed. You should monitor progress as the project proceeds. If there is an issue with the number of months, you are advised to discuss this with the lead partner as a matter of urgency.

11. Depreciation of Equipment

Each beneficiary must determine depreciation of any equipment purchased by them according to their accounting procedures. For example, MCC is treating the grant revenue (as opposed to capital) and therefore depreciation is not applied as all revenue costs are written off full in the period in which they are incurred. You are advised to obtain a statement from your accountants to this effect to place on the project file for evidence at audit. Only equipment purchased for the purposes of carrying out project actions can be charged as direct costs. The Lead Partner, Manchester City Council can advise on issues relating to the purchase of equipment if required.

12. Working with Subcontractors/Third Party Beneficiaries

Introduction

The use of subcontractors or third parties has arisen specifically in relation to Work Package 7: Living Labs Behaviour Change Research. In WP7 it is anticipated that subcontractors or third parties will work with the project partners to carry out and manage the installation of energy monitoring equipment to individual households. In some instances these may be partner or separate bodies which are non-profit or NGO's – non governmental organisations.

Subcontractor or Third Party Beneficiary

The difference between subcontractors and third party beneficiaries is the profit element. Where the organisation is a profit making entity with **no** established relationship with the project partner they do not qualify as a "Third Parties Linked to a Beneficiary" but are classed as a subcontractor. In these circumstances they are to be subject to a competitive procurement process in line with the relevant regulations – see Procurement of Goods and Services.

A further key difference is a subcontractor will submit an invoice for work carried out (and includes a profit element) whereas a third party beneficiary submits a claim for actual costs on Form C and supplies timesheets stating the effort (similar to the project partner).

Subcontractors

Subcontracted tasks are considered services provided to the beneficiary (i.e. project partner) by a third party (as distinct from a third party beneficiary). Subcontracted work is commissioned through a contract. Subcontractors submit an invoice which can include an element of profit.

Article II.7.1 of Annex II (General Conditions) p11 of the Dehems Grant Agreement defines subcontracting as *“an agreement on business conditions between a subcontractor and one or more beneficiaries, in order to carry out part of the work of the project without the direct supervision of the beneficiary and without a relationship of subordination”*.

Note Annex I must indicate the tasks to be subcontracted and an estimation of the costs. It is important to distinguish a subcontract as opposed to purchasing goods or services.

Article 11.7.3 also makes reference to the ability of *“Beneficiaries may use external support services for assistance with minor tasks that do not represent per se project tasks as identified in Annex I.”* Partners must make judgment of the definition of minor tasks as per project tasks. It is clearly NOT handing over significant parts of delivery.

Annex II of the GA 11.15 refers to personnel costs are direct costs and states that personnel must be directly hired by the beneficiary, work under the sole technical supervision and responsibility of the beneficiary and be remunerated in accordance with the normal practices of the beneficiary. Anyone who works for the beneficiary but does not qualify in this respect should be classed as a subcontractor.

Subcontractors in FP7

Subcontracting is discouraged under FP7 projects. The regulations state that “as a general rule beneficiaries must have the capacity to carry out the work themselves. Subcontracting is derogation to this general rule and is limited to specific cases”. It goes on to say that “as a general rule, subcontracts do not include the research work itself, but additional or complementary tasks.”

Where subcontractors are used, the FP7 regulations state that all tasks have to be indicated in Annex I – Description of Work.

Note that subcontracting is not eligible for indirect costs.

Subcontractors – Auditing by the Commission

It is a requirement of FP7 (Framework 7) funding that subcontractors can be audited by the Commission or the Court of Auditors. Article II.7 of the Grant Agreement deals with Subcontracting.

One of the conditions for use of subcontractors is that "***the beneficiary must ensure that the subcontractor can be audited by the Commission or the Court of Auditors***"

You are advised to make the subcontractor aware of this fact and also to include this detail in their contract.

Subcontractors and Dehems

In order to include subcontractors in Dehems a letter must be sent to the Commission asking to amend the Description of Work. This must be done by the lead partner. Any beneficiaries wishing to include subcontractors **MUST** discuss with the lead partner before any action or payment is taken.

Project Beneficiaries as Subcontractors

The Financial Guidelines SECTION 3: IMPLEMENTATION Article II.7 of GA – Subcontracting states that "subcontracting between beneficiaries in the same GA is **not** to be accepted. All participants by definition contribute to and are interested in the project, and where one participant needs the services of another in order to perform its part of the work, it is the second participant who should declare and charge the costs for that work."

Therefore all project partners (i.e. beneficiaries) of the project can not be subcontracted by another beneficiary to perform work on another's behalf. Consequently a partner can not accept invoices from another partner for any work relating to the FP7 project.

In the event that you do so, this amount will be deducted from your financial claim by the Commission.

Third Party Beneficiaries

A third party beneficiary can not include any element of profit and must be declared by Special Clause number 10 into article 7 entitled “THIRD PARTIES LINKED TO A BENEFICIARY” (see below). This document is then appended to the GA.

A third party organisation is NOT part of the same entity as the project partner but is a not-for-profit organisation with an established legal partnership arrangement with the project partner.

The financial claim process is similar to that for a project partner – actual costs and timesheets are submitted with supporting evidence. Claims are submitted via a Form C. This means that the Third Party is paid direct by the project in the same way that partners are – the result is that they will be on the payment schedule and that payment may be delayed. This may not work for small organisations.

Summary

- **Third Party**
- Not for profit organisation
- Claims actual costs via Form C – timesheets; payroll evidence
- Register via Unique Registration Facility – company info
- Could contribute additional funding via match funding (see below)

- **Subcontractor**
- Profit element
- Submits invoice
- Procurement – transparency; fairness
- Audit will judge procurement procedures
- Not able to contribute match funding

Actions by Dehems Partners

Partners must determine if they wish to use a subcontractor or a “Third Parties Linked to a Beneficiary”. These organisations should be reported to the Coordinator.

Partners should also look at the amount of expenditure to be made to each third party and include in their budget.

If any partner wishes to instigate either a subcontractor or a third party beneficiary, the must first discuss with the lead partner.

Match Funding and Third Parties

A third party beneficiary can provide match. The match element should be **separate** to the third party effort. For example, resources additional to the subcontract such as the salary of an additional person. Timesheets are required for any salaries used.

13. Procurement of Goods and Services

The financial procurement of all goods and services must fall within the regulations set out by both partner organisation and the European Union FP 7 guidelines.

EU procurement rules are complex. Where doubt remains about the application of the procurement rules, it is better to err on the side of caution. Grant may be reclaimed if the Commission deems that procurement rules have not been observed or if no evidence is available to prove they have been observed. Appropriate evidence (specification, copies of adverts, website screenshots, quotes, written selection process, scoring documentation, explanations etc) must be retained to demonstrate compliance.

The FP7 Financial Guidelines refer to procurement in Article 7.11.2 (p25) in the context of subcontracting. This applies to the purchase of goods and supplies. **Note that project partners can not be suppliers of goods and services to other partners of the consortium.** The FP7 Guidelines state that the procedure depends on the status of the partner i.e. public or private.

“Public bodies must follow the procurement principals established by their national authorities.

Private entities should follow the rules they “usually apply for the selection of procurement contracts” and goes on to state that several quotes would be normally required (a minimum of three).”

Private Entities

Experience of both FP7 and other EU projects at Manchester City Council lead us to suggest that ALL private partners should follow the rules laid out by European Regional Development Funding (ERDF).

Partners should ensure that the supporting documentation held on file will enable an auditor to understand clearly the justification for the purchase, evidence of quotations and the reason for the chosen supplier should ensure that all partners are sufficiently protected against potential claw back.

Extract from ERDF guidance.

Estimated Value	Action Required
Below £250	No quote
£250 - £500	Single oral quote
£501 - £2500	Minimum of three oral quotes
£2501 - £15,000	Minimum of three written quotes based on a clear specification
£15,001 - £50,000	Minimum of three formal competitive tenders : <i>NB consult MCC for advice at this level of expenditure</i>

Public bodies: will have their own regulations and these should be documented and followed. Again you should ensure that the supporting documentation held on file enable an auditor to understand clearly the justification for the purchase, evidence of quotations and the reason for the chosen supplier should ensure that all partners are sufficiently protected against potential claw back.

Supporting Documentation

A robust approach is to assemble the appropriate evidence in to a plastic wallet for each item/service purchased and create a “procurement” file to include specification, copies of adverts, website screenshots, quotes, written selection process, scoring documentation, explanations etc. The check list summarises requirements:

Description	Evidence
Outline of the proposed purchase	Written specification of item or service; file note outlining details
Quotations / submissions from suppliers	Emails; file note of oral quote; website screen shots
Justification for selected supplier	Justification of selected supplier; any scoring system and relevant scores for all candidates - this document should be DATED and SIGNED a senior member of staff.
Contracts issued	SIGNED copy

14. Document Retention

The Commission has the right to request an audit up to 5 years **(financial OR project)** after the end of the project – in this case 2016. It is the individual partner who is audited and not the project.

ALL PROJECT DOCUMENTATION MUST BE RETAINED UNTIL 2016.

15. Project Files

Each partner should construct a project file and include all documents, deliverables relating to the project. This should include job descriptions for all staff, including any used as match funding, an organisational chart of how staff within the project relate to the organisation as a whole, financial transactions and grant agreements.

MCC has an established system for document management for EU projects and this can be made available to any partners.

16. Intellectual Property Rights (IPR)

FP7 distinguishes between two elements:

- Foreground: results, materials and knowledge generated by the project.
- Background: relevant information and knowledge held by partners before being involved in the project.

Full details of IPR in the EU reference document
ftp://ftp.cordis.europa.eu/pub/fp7/docs/ipr_en.pdf

17. Ethics and Data Protection

This information focuses on partner responsibilities as “data controller” for personal data. It is not concerned how the research might be used when processed.

Responsibilities focus on personal data i.e. data which relate to a living individual who can be identified. As “data controller” each living lab is responsible for ensuring they comply with their countries legal requirements. Data protection legislation has been harmonised in the EU and hence there should be no significant differences between the national laws.

- UK - Data Protection Act 1998
www.ico.gov.uk/for_organisations/data_protection_guide.aspx
- Bulgaria - Personal Data Protection Act 2002 www.aip-bg.org/pdf/pdpa.pdf

FP7 Ethical Guidelines for undertaking ICT research in FP7 - Section 2.2

The EU document detailing the ethical guidelines relating to ICT research in FP7 - <ftp://ftp.cordis.europa.eu/pub/fp7/docs/guidelines-annex5ict.pdf> states that “researchers must comply with the Data Protection legislation in the Member State where the research will be carried out”.

Section 2.2 states that the volunteers have the right to remain anonymous. It is not relevant that households are anonymous from their Living Lab contact given the need to visit people’s homes etc. Key is “informed consent” – are the volunteers able to make an informed decision about what they are being asked to do? In DEHEMS we are installing equipment in people’s homes and they have the project explained to them, it could be argued that they do, without the need to involve signing forms etc. The advice to partners is to ensure documentary evidence of a clear process on how they have informed their participants about what DEHEMS is and what they are ‘signing up for’. For example, information at the installation and newsletters.

18. Change Control and Issues Management

If there are ANY elements of change required by a partner the following approval process should be followed consult with work package leader. You should consider is there a solution? What is the impact on schedule? Could another project partner assist? Issues should be raised with the Work Package Leader, Programme Manager and MCC.

19. Risk Management

If you identify any risks to your work, you should discuss these with the Work Package Leader. Risks will be logged in a programme ARIAD log (Assumptions, Risks, Issues & Dependencies). It will be owned by the programme manager who will undertake regular risk reviews with all work package owners. The log is available on the DEHEMS intranet.

Product and Public Liability Insurance

Part of the Dehems project includes the installation of equipment in to domestic homes. This raises issues of liability in the event of a problem occurring as a result of the item or the installation process. Whilst this is considered highly unlikely, it is prudent to ensure that there is insurance in place should the need arise. All installers must be covered by their own public liability insurance and beneficiaries should obtain a copy of the certificate for the project file.

The product should also carry product liability insurance. For example manufacturer of the equipment used in Cycle 1- Current Cost carry £2m product liability insurance.

20. Reporting Requirements

The purpose of the project review and the periodic report is for the EU to review the performance of the project, be assured of value for money and that the project is on track for successful delivery. Project partner should ensure that their work is fully reflected in the report submitted by the WP leader. If it is not reported here, then how will the EU know what you have been doing? How will they know what you have spend their money?

Work package leaders are asked to use the internal template to submit reports on WP progress and to refer to the Annex I document for the aims and objects of their WP.

Reporting Periods

The project is required to submit a report to the Commission in the following intervals:

(T0+6) 30th November 08

(T0+14) 31st July 09

(T0+24) 31st May 10

(T0+30) 30th November 2010 - final report

MCC as lead partner will issue the date required for submissions by partners. This date will be earlier than the date submitted to the Commission due to the need for MCC to check, verify and collate the submissions.

21. Explanation of the Use of the Resources Table 3.8

The periodic report asks each partner to explain their use of both time and money. Table 3.8 should be completed in some detail

TABLE 3.8 PERSONNEL, SUBCONTRACTING AND OTHER MAJOR DIRECT COST ITEMS FOR BENEFICIARY 1(MCC) FOR THE PERIOD			
WP	Item description	Amount	Explanations
1	Personnel costs	30808.78	Staffing costs – project management and financial management activity – includes production of the periodic report, financial claim, NEF activity, liaison with EU officers.
1	Other direct costs	2668.33	FP7 EU ICT coordinator workshop in Brussels, 4 day FP7 training course in London; domain hosting; review meeting costs; stationery: teleconferencing software
1	Equipment	226.68	Display monitor
1	Travel	2866.50	Travel & accommodation to Brussels & London for FP7 training (4 days) and EU workshop (2 days) ; expenses; taxi costs; project coordinator travel to meetings with WP leaders
2 – 8	Personnel costs	38998.89	Staffing costs - participation in delivery of project activity in all project work packages. Includes editing of deliverables and delivery of the Manchester Living Lab activity.
7	Subcontracting	3091.14	Payment to subcontractor for installation of Cycle 1 equipment in Living Lab.
8	Other direct costs	1106.12	EU logos energy monitoring equipment; printing and design; exhibitor fee for Environlink conf
7	Equipment	15841.86	Energy monitoring equipment for UK living labs; servers for data storage
2 – 8	Travel	3076.17	Travel to Plovdiv for user group and technical meeting; user group meetings Birmingham; Living Labs conference fee, hotel and accommodation; Eurocities environment symposium on climate change; Telecities meeting; ICT summit Brussels
TOTAL DIRECT COSTS		98,684.47	

Note that the feedback from the EU has revealed has released partial payments only to a number of partners for the following reasons:

- computer equipment purchased for 100% use on the project - only 50% of these costs have been allowed
- lack of detailed description and clarity for justification for costs in the table 3.8.

MCC will also collate a table to describe the man month effort for each partner against the project profile. See example below: Partners must submit the relevant information to MCC in order that this information can be included in the report.

Grant Agreement number: 221409
Debitum Periodic Report V2.0

PROFILE	MCC	Uctuj	CL	Hild	Bris	UR	Birm	Ucov	Cent	Usal	EAP	Avob	leAT	Total
WP1	29.55	0.5	0.5	0.5	0.1	0.2	0.12	0.5	0.1	0.5	0.1	0.1	0.2	32.97
WP2	2.5	-	2.9	1	0.6	-	-	2.3	-	17.2	0.8	0.8	-	28.10
WP3	2.5	5.6	2.9	1	-	-	-	20.13	-	1	-	-	8.6	41.73
WP4	2.5	6.2	2	1.2	-	8.03	-	-	-	10.23	-	-	-	30.16
WP5	2.5	2.3	1	2.73	-	5.3	-	-	-	5	-	-	8	26.83
WP6	2.5	-	3.94	9.1	-	-	-	-	-	2.9	-	-	9.68	20.12
WP7	12.3	-	4.2	-	14.89	-	13.98	-	-	6	7.3	7.3	-	65.98
WP8	5.8	1.1	2	1	0.1	0.7	0.3	1	1.14	1.3	0.1	0.1	2	16.64
TOTAL	60.15	15.70	19.44	16.53	15.69	14.23	14.41	23.93	1.24	44.13	8.30	8.30	26.48	270.53

CLAIM2	MCC	Uctuj	CL	Hild	Bris	UR	Birm	Ucov	Cent	Usal	EAP	Avob	leAT	Total
WP1	9.33	0.05	0.20	0.25	-	-	-	0.30	0.08	0.24	0.04	-	-	10.49
WP2	1.20	-	0.75	0.52	-	-	-	0.38	-	6.76	0.83	-	-	10.44
WP3	0.45	-	0.75	0.52	-	2.34	-	7.96	-	0.04	-	-	0.37	12.43
WP4	1.50	0.55	0.59	0.52	-	1.40	-	-	-	0.19	-	-	-	4.74
WP5	1.60	-	0.31	2.11	-	-	-	-	-	1.40	-	-	2.84	8.18
WP6	1.85	-	0.84	1.53	-	-	-	-	-	0.11	-	-	5.12	9.45
WP7	3.10	-	1.16	0.00	5.82	-	2.63	-	-	0.57	1.70	2.00	-	16.97
WP8	0.63	-	0.75	0.10	-	-	-	2.30	0.23	0.03	-	-	0.68	4.72
TOTAL	19.56	0.59	5.35	5.55	5.82	3.74	2.63	10.94	0.31	9.34	2.57	2.00	9.01	77.40

TO DATE	MCC	Uctuj	CL	Hild*	Bris	UR	Birm	Ucov	Cent	Usal	EAP	Avob	leAT	Total
WP1	14.51	0.35	0.41	0.25	0.10	-	-	0.53	0.08	0.50	0.08	-	0.07	16.88
WP2	1.20	-	2.42	0.52	-	-	-	0.57	-	8.20	0.83	0.50	-	14.24
WP3	0.45	2.81	2.43	0.52	-	2.34	-	8.53	-	0.25	-	-	2.09	19.42
WP4	1.50	5.44	1.90	0.52	-	3.74	-	-	-	0.61	-	-	-	13.71
WP5	1.50	1.29	1.02	2.11	-	1.40	-	-	-	1.58	-	-	4.60	13.51
WP6	1.85	-	2.73	1.53	-	-	-	-	-	0.25	-	-	7.28	13.63
WP7	5.65	-	3.75	-	7.06	-	6.47	-	-	0.62	1.70	2.00	-	27.25
WP8	0.63	-	2.43	0.10	-	-	-	2.45	0.35	0.07	-	-	0.82	6.85
TOTAL	27.29	9.89	17.08	5.55	7.16	7.48	6.47	12.08	0.43	12.08	2.61	2.50	14.86	125.48

* Details of Claim 1 are outstanding to lead partner - total effort for Hild to be adjusted

22. EU Review Meetings

These are held according to the schedule in the Description of Works. The review meeting is an opportunity for the consortium to present their work during that period to the EU. From the EU, it is an opportunity to assess the success of the project and give recommendations for improvement/changes. Partners must be correctly represented i.e. relevant person(s) is sent and is able to discuss the partners role in the project. Number of representatives should reflect both work and expenditure made to represent value for €. It

is recommended that attendees read the periodic report before attending to ensure that that they can answer any questions from the EU.

23. Reference Documents

The following documents can be located on the Dehems Intranet (Huddle) – contact the Lead Partner, Manchester if you do not have a registration:

- Consortium Agreement
- Grant Agreement
- Description of Works – Annex I
- Project logos
- Project and partner budgets
- Timesheet template

24. Sources of Information: FP7

Documents and guidelines may be located at the following:

- EU funded project providing documents and advice www.finance-helpdesk.org
- Free downloadable book
<http://www.finance-helpdesk.org/front/ShowCategory.aspx?CatId=48>
- An eBook on proposals and managing FP7 projects www.fp7coach.eu
- Official EU FP7 site document http://cordis.europa.eu/fp7/find-doc_en.html
- Self help question and answer site run by FP7 community www.meeusfp7.eu
- Dehems Project website www.dehems.eu
- Dehems Project Intranet – Huddle Account www.huddle.net (a login is required provided)
- European Central Bank (ECB) exchange rates <http://www.ecb.int/stats/eurofxref/>
- Guide to Financial Issues relating to FP7 Indirect Actions
ftp://ftp.cordis.europa.eu/pub/fp7/docs/financialguide_en.pdf
- Guidance Notes on Audit Certification [PDF] Version: 2008-03-19
ftp://ftp.cordis.europa.eu/pub/fp7/docs/guidelines-audit-certification_en.pdf