

EDIT

● ● ● European
● ● Distributed
● ● Institute of
● ● Taxonomy

EDIT

Management issues

Kick-Off meeting - Paris, 28-29th June 2006



Outline of the Presentation

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Short presentation of CDC

- ★ Established in 1816, CDC is a Public Financial institution.
- ★ Its primary function is to administer, with total security, public and private funds entrusted to it by the French government.
- ★ It is mainly committed to socially responsible investment, issuing loans for social housing and urban development.
- ★ Competitive businesses are carried out by its subsidiaries.
- ★ Since 2003, CDC is in charge of the coordination of several FP6 consortia.

Coordinator role

CDC, as EDIT coordinator, will deal with administrative and financial issues:

Administrative contact

- ★ Contractual coordination: setting-up of contractual documents (EC-Contract, Consortium Agreement, Forms A), and follow-up of their evolution (amendment)
- ★ Support on administrative matters

Financial contact

- ★ Distribution of the EC-Grant to partners (following EDIT Network Steering Committee's decision)
- ★ Support on eligibility rules
- ★ In charge of the Periodic Management Report to be sent to EC yearly

Coordinator contacts

★ Caisse des dépôts et consignations (CDC)

Public financial institution

**Experience with several FP6 NoE and IP consortia
coordination**

Team Leader

Jean-Noël Forget

Main contacts

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Serge Roger (IMT tool)

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Coordinator actions on 1st year

- 1 – Signature of the EC-Contract
- 2 – Drafting and finalisation of the Consortium Agreement
- 3 – Launching of the Information Management Tool (IMT)
- 4 – Distribution of the EC-Contribution
 - following the EDIT NSC proposal and Board of Directors' decisions
- 5 – Submission of an EC-Contract amendment (if necessary)
- 6 – Drafting of the annual management report
- 7 – Negotiation of the amount of the 2nd Advance Payment

EDIT: Management & budget

EDIT Network Office (CDC + MNHN) will ensure:

- ★ the proper collection of all scientific deliverables (MNHN)
- ★ that NOE used the whole advance payment, collecting partners' Forms C and drafting Periodic Management Report (CDC)

Total EDIT budget (whole duration of the project)	11,9 M€
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Amount of the EC-Grant to be distributed (during 1st year)	2,33 M€
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The first advance payment will be 1/3 of the grant planned for the first 18 months. Another third will be transferred the 7th month upon validation by the NSC. The third payment, after 12 months, will be proposed by the NSC and will have to be validated by the BoD.

Reporting and evaluation: EC Requirements

In order to meet EC management requirements about Periodic Management Report, please remind:

- ★ To justify and certify an amount of eligible costs superior to the amount of the EC-Grant distributed
- ★ To justify an amount of time spent in comparison with planned efforts (Annex 1 to the EC-Contract: “Description of work”)

Reporting and evaluation: Components

1 – Periodic Management report (Section 1)

- ★ Overview of partners' activity per workpackage
- ★ Partners' activity per workpackage / activity (3 lines comment)
- ★ Planned and achieved activities comparison
- ★ Partners' major costs
- ★ Total effort per partner and per workpackage
Special table for AC-partners

2 – Financial report (Section 2)

- ★ Form C
- ★ Audit certificates when needed

3 – Report on the distribution of the EC-Contribution

4 – Questionnaires

Reporting and evaluation: Definitions

Time data

- ★ **Total time spent:** total time spent by a researcher involved in the project, in EDIT area of interests.

Financial data

- ★ **Total costs:** total cost of any incurred expenditure related to the EDIT project (Manpower, Equipment, Consumables, Travel, Others, Overheads);
- ★ **Eligible costs:** eligible part of the total cost. This part is to be defined in relation to the chosen cost model and the type of expenditure.

Reporting and evaluation: Information Management Tool

In order to collect all data necessary for the Periodic Management Report, CDC has set-up an web based system allowing partners to record their own data:

Time data *(Each researcher has an individual account to report his/her time)*

- ★ Total time spent: estimation of the global effort provided by partners (once a month)

Note: This will allow partners' institution to provide EC with timesheets in case of an EC audit (it could occur up to 5 years after the termination of the EC-Contract)

Financial data *(Only Team leaders concerned)*

- ★ Total costs incurred (quarterly, to allow project monitoring)
- ★ Eligible costs (quarterly, to allow project monitoring)

CDC is in charge of IMT administration, providing helpdesk to partners on both eligibility rules and IMT browsing.



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Should you have any questions?...

**A workshop on IMT will be held tomorrow.
Do come along!**