



Artificial Intelligence and Gamification in Vocational Training Guidance

PROJECT MANAGEMENT MANUAL ADMINISTRATIVE & FINANCIAL RULES

April 2023

KA210-VET - Small-scale partnerships in vocational education and training 01/04/2023 – 30/11/2024 -
2022-2-IT01-KA210-VET-000097851



Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them










Co-funded by
the European Union

OVERVIEW

- General principles
- Eligibility of expenses
- Budget categories and required documentation
- Partners documents
- Reporting
- Checks and audits
- Impact
- Dissemination
- After the Meeting



General principles - Reference documents

- Erasmus+ Programme Guide 2022 
- Application Form 
- Detailed Budget 
- Grant Agreement (Convenzione) 
- Grant Agreement Annexes:
 - Annex I – General Conditions 
 - Annex II – Estimated Budget 
 - Annex III – Financial and Contractual Rules 

Available on
Google Drive
Project
account



General principles - Reference documents

- Partner Agreement
 - Timesheets
 - Payment requests
 - Staff job contracts
- To send by e-mail

- All needed dissemination evidences
 - All needed impact evidences
- To upload on Google Drive project account



General principles - Budget summary

See ANNEX II

Total amount approved: 60.000,00 euros.

Budget Items	Grant (EUR)
Project Management	12.000,00
Transnational Project Meetings	3.450,00
Mapping of the guidance process	11.250,00
Development of Artificial Intelligence Module and Gamification Scenarios	18.000,00
Data Monitoring and Analysis	9.000,00
Interactive Guide Development	6.300,00
Total Grant	60.000,00




General principles - Terms of payments

Partners pre-financings will “follow” the NA pre-financing

Category	%	Requirement	When
Pre-financing	80	Partnership Agreement signing	After signing and sending the Partner Agreement and the Payment request
Final payment	20	Final Report submission	After the approval and validation by the National Agency of the Final Report Final report deadline: no later than 29/01/2025 Reporting period: project start - end date



Eligibility of expenses - Eligible costs

- Incurred by beneficiaries
- Incurred during the project lifetime (implementation period)
- Incurred in connection with the action
- Indicated in the Application Form and according to the Annex 2 
- Necessary for the project implementation
- Identifiable and verifiable (supported by relevant documentation)
- Work packages / activity has been completed



Budget categories and required documentations

Even if proof of expenses are not required for the Final Report, Partners must demonstrate them in case of audit or desk checks or on-the-spot-checks, so we will collect them during the project life.

FORFAIT COSTS (but we must respect the working days and lump sums defined in the application form)	Project Management
	Transnational Project Meetings
	Mapping of the guidance process
	Development of Artificial Intelligence Module and Gamification Scenarios
	Data Monitoring and Analysis
	Interactive Guide Development



Activity: Project Management

Concerns management of the project by the Partners:

- General project management (planning, finances, coordination and communication between partners)
- AI.1: Definition and development of communication plan
- AI.2: Definition and development of reporting plan
- AI.3: Definition and development of the quality and risk management plan

Supporting Docs

- Timesheets per person
- Proof of the nature of the relationship between the staff member (whether on a professional or voluntary basis) and the beneficiary as per official records of the beneficiary.
- Outputs uploaded in the Erasmus + Project Results Platform and, depending on nature, available for checks and audits at the premises of the beneficiaries e.g. proof of output/products (pictures, videos, websites etc.)



Activity: Project Management

Expected results

- Project and accounting-administrative management Manual
- Quality and Risk Management Plan
- Project Website
- Communication plan
- Privacy Management System Plan

Reference Period

- 01/04/2023 – 30/11/2024



Activity: Transnational Project Meetings

- For planning, coordination, evaluation, preparation, dissemination
- Hosted by one of the participating organisations
- Participants in TPM need to have a formal link with beneficiary organizations (staff of the project)
- Reporting in the Mobility Tool by the coordinator

Supporting Docs

- Attendance Certificates signed by receiving organisation
- Participants list signed by the participants and the receiving organisation
- Detailed agendas and any documentation used or distributed at the TPM (e.g. minutes, slides etc..).
- Boarding passes + Job contracts or other documents proving the link between participant and Partner
- Pictures, video etc...



Activity:

Transnational Project Meetings - Online

- In case of online TPM, no unit costs can be declared, so no funds can be used.
- Costs related to online TPM will be taken from “Project management and implementation” budget

Supporting Docs

- Attendance Certificates signed by receiving organisation
- Details agendas and any documentation used or distributed at the TPM (e.g. minutes, slides etc..)
- Pictures, videos and all other documents that can “prove” the online TPM
- Detailed report with the description of platform used and sharing system adopted
- Job contracts proving or other documents the link between participant and Partner



Activity: Transnational Project Meetings

Expected results

- 1 Face To Face Meetings (3rd in Greece)
- 3 online Meetings (1st , 2nd and 4th)

Reference Period

- Online KOM – May 2023
- Online TPM – December 2023
- TPM in Greece – October 2024
- Online TPM – November 2024



Activity:

Mapping of the guidance process

- A3.1: Description of the guidance process as actually carried out within the partner organizations
- A3.2: SWOT analysis of the guidance process
- A3.3: Elaboration of ideal and final flow-chart based on the results of the SWOT analysis carried out and the inputs coming from outside

Supporting Docs

- Timesheets per person
- Proof of the nature of the relationship between the staff member (whether on a professional or voluntary basis) and the beneficiary as per official records of the beneficiary.



Activity:

Mapping of the guidance process

Expected results

- Pathway/Flow - chart as a visual representation of the guidance process within Partners
- SWOT analysis of the guidance process
- Final Flow - Chart as a review of the current one in place at the partner organisations based on the results of the SWOT analysis carried out and the inputs coming from outside

Reference Period

- 01/04/2023 – 30/09/2023



Activity:

Development of the Artificial Intelligence Module and Gamification Scenarios

- A4.1: Definition of the knowledge base (KB)
- A4.2: Game definition
- A4.3: Chatbot and game design and implementation

Supporting Docs

- Timesheets per person
- Proof of the nature of the relationship between the staff member (whether on a professional or voluntary basis) and the beneficiary as per official records of the beneficiary.



Activity:

Development of the Artificial Intelligence Module and Gamification Scenarios

Expected results

- Artificial intelligence module in the form of a chatbot that allows the analysis and evaluation of the user
- 2D gamification environment for the simulation of work scenarios

Reference Period

- 01/10/2023 – 30/04/2024



Activity: Data Monitoring and Analysis

- A5.1: Artificial intelligence module' Beta release testing
- A5.2: Performance Analysis through NPS
- A5.3: Draw up of final report
- A5.4: Tools review

Supporting Docs

- Timesheets per person
- Proof of the nature of the relationship between the staff member (whether on a professional or voluntary basis) and the beneficiary as per official records of the beneficiary.



Activity: Data Monitoring and Analysis

Expected results

- Focus groups with the participation of no. 15 vocational guidance and training professionals
- Information and training material related to the tools implemented
- Performance indicators and survey/questionnaire with multiple-choice and open-ended questions to assess the project results using NPS methodology
- Final report analysing the data acquired and processing the results with evidence of any additions/revisions
- Revised artificial intelligence module and gamification scenarios (if applicable).

Reference Period

- 01/05/2024 – 31/08/2024



INTELLEGIZE

Artificial Intelligence and Gamification in Vocational Training Guidance
2022-2-IT01-KA210-VET-000097851



Co-funded by
the European Union

Activity: Interactive Guide development

- A6.1: Development of Interactive manual /guide on web platform
- A6.2: Development of Operating Instructions for Gamification Scenarios

Supporting Docs

- Timesheets per person
- Proof of the nature of the relationship between the staff member (whether on a professional or voluntary basis) and the beneficiary as per official records of the beneficiary.



Activity: Interactive Guide development

Expected results

- Interactive manual /guide about the Artificial Intelligence Module.
- Operating Instructions for Gamification Scenarios.

Reference Period

- 01/09/2024 – 30/11/2024



Partners documents

In order to well develop all project activities, you will receive specific to-do lists and workplans and we will share with you all templates, information and project documents

Common space to all partners for products/ deliverables/administrative documents:



Reporting

- Interim Report by 01/03/2024 referring the period 01/04/2023 – 01/02/2024
- Final Report by 29/01/2025 referring the period 01/04/2023 – 30/11/2024
 - shows the consistency of project outcomes and results with the proposal presented at application stage
 - has a similar structure of the application form and shall explain how the action was implemented and the results were reached
 - allows to NA to evaluate the Relevance of the project, the Quality of the project design and implementation, the Quality of the partnership and cooperation arrangements and the Impact
 - project results and outcomes must be uploaded on the Erasmus+ Project Results Platform

In addition, beneficiaries are invited to carry out a **self-assessment/lesson learnt** exercise and reflect on the quality of the implementation of their project, the successes and the problems encountered



Reporting

Proofs of incurred expenses is not required at final report stage.

However, the beneficiary has to keep all relevant documentation to demonstrate that the activities for which the grant was awarded have actually been carried out in case it is required by the National Agency when conducting a check during project implementation or after the completion of the project.

For this reason, we will produce these documents during the project life.



Reporting

According to the final report, Evaluators attribute an overall score to the project, calculated as the sum of the individual scores attributed to each of the criteria:

Criteria	Maximum score
Relevance	20 points
Quality of the partnership	20 points
Quality of the project implementation	30 points
Impact	30 points



Reporting

According to the score allocated by evaluators, the grant is paid as follow:

Project score	% Grant Paid
60 – 100	100%
45 – 59	90%
30 – 44	70%
10 – 29	30%
0 - 9	0%



Checks and audits

There are four levels of control:

I. Final report check – For all projects

- The final report will serve to assess the results of project in terms of quality and quantity, to establish the final amount of the EU grant and to issue the final grant payment or recovery order, as well as to administratively close the grant agreement.
- As the lump sum funding model includes no financial reporting but only implementation reporting, there are no financial checks as such at the time of the final report.
- During the final report assessment, evaluators can request beneficiaries to provide or produce additional evidence in case the information they provided spontaneously is not sufficient to support the assessment.



Checks and audits

There are four levels of control:

2. Desk checks – for a sample of beneficiaries

- in-depth analysis of the final report with the verification of documental evidence for the actual implementation of project activities.
- In case specific risks are identified, NAs can select individual projects for in depth and on the spot checks.
- Documents proving the actual implementation of the activity could be, for example, attendance lists for meetings, training materials, deliverables produced, photos and videos taken during an event, etc.



Checks and audits

There are four levels of control:

3. On-the-spot checks – some random and some risk-based sample.
 - in-depth analysis of the project, before or after the submission of final report with the verification of documental evidence for the actual implementation of project activities.
 - collect additional evidence of activities carried out and deliverables produced.



Checks and audits

There are four levels of control:

4. Audit – some random and some risk-based sample.

- Conducted by independent audit body or by the European Commission
- The scope of the audits can vary and is communicated to the beneficiary in due time, together with the necessary practical and logistic information. Also in this case, the documentation requested from the beneficiary will mainly be related to the implementation of the project activities and production of deliverables, and will not put the lump sum principle into question.
- Occasionally, in the context of a specific audit scope aimed at the periodical revision of the system of lump sums, auditors can request documentation proving the real costs incurred for some of the project activities. However, there are no obligations concerning the accounting system to be followed by beneficiary



Impact

Expected impact of the project is not related to Indicators, but refers the effects of the Project activities on:

- individual participants
- Partner Organisations
- stakeholders involved in guidance



Impact

For individual participants expected impact is:

- development of digital skills, through the testing of the artificial intelligence module and its availability at the end of the project in English and in the mother tongue;
- strengthening of professional skills that characterise work practice through the use of innovative tools (chatbots and gamification scenarios);
- free access to and use of the interactive guide and operating instructions for the use of the artificial intelligence module and gamification scenarios;
- socialisation and knowledge of results with testing and evaluation focus groups.



Impact

For Partner Organisations expected impact is:

- availability of a revised guidance service model/path
- availability of innovative tools based on the application of artificial intelligence and gamification
- availability of no. 15 guidance practitioners informed and trained in the use of outputs
- development of language and digital skills of staff
- development of capacity to work transnationally
- satisfaction and ability to manage teams.



Impact

For stakeholders involved in guidance expected impact is:

- availability of digital tools that facilitate the guidance activity
- orientation practices using artificial intelligence and gamification
- European comparison on innovative tools for the delivery of guidance practice..



Dissemination

All the project activities and results will be disseminated by the Partners through:

- Their company website
- Their social network accounts (Linkedin, Facebook, Instagram etc..)
- The Project website
- The project social network accounts
- Project newsletters
- Dissemination events during and after the project: an information event to disseminate the results achieved in hybrid mode at the end of each activity, a final project conference, the presentation of results at industry conferences and webinars also promoted by other organisations,



Dissemination

Dissemination activities will be reported by Partners one month before the deadline of interim report and final report.

The report will contain information about the dissemination activity carried out: description of activities, reached/involved people, pictures, screenshot, attendance lists etc...



After the Kick-Off Meeting

The Lead Partner will:

- Share the Google Drive Project Account
- Produce and share the timesheets template
- Produce and share the Attendance List and Certificates template
- Upload all documents produced during the meeting (presentations, certificates, pictures etc..) on the Google Drive Project Account – Folder TPM
- Produce and share the minutes



After the Kick-Off Meeting

The Lead Partner will:

- Produce and share the Partner agreements
- Produce and share the Payment request template
- Produce and share the Project and accounting-administrative management Manual
- Produce and share Quality and Risk Management Plan
- Send to the IT Partner the information to implement the Project Website
- Produce and share Communication plan
- Produce and share the Privacy Management Plan (with the IT Partner)

