
Applying for Workshop- / Mentoring- / Twinning-Budget from CASTIEL

Workshops

Topic-focused workshops will be organized by or with the assistance of CASTIEL where and when needed (at least once per topic and per period between the global joined EuroCC-CASTIEL workshops). The main idea behind this is to identify similarities in the needs of NCCs and then to organize regional workshops to ensure short ways and tailored contents.

Workshop topics and the possibility of holding a workshop/giving a seminar/giving a presentation with the involvement of the NCCs depend on survey results and the level of experience of NCCs in the topics which are most relevant according to the surveys. When the decision about giving a workshop by an NCC has been made and agreed on with the CASTIEL WP3 contact person – Martina Blazkova (martina.blazkova@bsc.es), then it is possible to apply for a portion of the budget which was reserved for workshops within the CASTIEL project.

Please note the following rules:

- If a person is officially working for EuroCC or CASTIEL, then the time for preparing and giving a workshop/seminar/presentation is also financed from the already allocated personnel budget of EuroCC or CASTIEL respectively.
- When a speaker comes from an NCC-linked organisation but is not working officially for the EuroCC/CASTIEL project OR the speaker comes from outside the EuroCC or CASTIEL projects: an official contract¹ with this person has to be signed and this person can get remuneration for giving a workshop. The fee or “financial support” that this person will receive should not be higher than the average remuneration for workshop speakers in the NCC’s country and cannot exceed the EU rate foreseen for *expert involvement* (i.e. it may not exceed 450€ for a full day nor 225€ for half a day).

The fees are subject to the following conditions:

- The fee can be claimed only for days actually worked (i.e. the workshop day(s) actually attended/presented at);
- Travelling time cannot be considered as working time; however, travel costs of the expert can be claimed separately (an average of 500€ was planned per expert in the budget).
- Attendance must be confirmed by the workshop organizer or noted in an attendance sheet/list of participants.

Please note: CASTIEL WP3 employees are exempt from receiving any remuneration for workshop, twinning or mentoring activities.

IMPORTANT: However, in case of external speakers, the organizing NCC/responsible person should present proof that it was not possible to find a speaker who is already working for any of the projects (EuroCC & CASTIEL) and proof that there was also no other NCC staff member in EuroCC/CASTIEL qualified to lead such a workshop/give a presentation on this topic.

This means in practice that the NCCs/CASTIEL should first ask staff in their own NCC/in CASTIEL, if no person is qualified there, then as the next step address all other NCCs and ask for qualified staff to give a workshop/presentation on the selected topic. Only if no qualified speaker is available among any of

¹ The contract can be of the form you usually use at your institution. Please pay attention to clearly state the *date, name of the workshop* and that it is organized within the *EuroCC/CASTIEL projects*.

the NCCs' staff, a person outside the EuroCC and CASTIEL staff may be commissioned as a workshop speaker.

Workshop Budget at CASTIEL

Planned costs around a workshop include catering, room rent, and, if necessary, equipment rent (if applicable, depending on development of the pandemic situation). In case participants do not have the funds for travelling and need financial support, we plan a rate of 500€ for such a workshop as support for expenses occurred on the side of the participant.

In case a workshop will be **held virtually**, it is expected that no travel expenses occur on the side of the workshop participants, nor catering or room rent costs on the side of the workshop organisers. Should the need arise to purchase software licenses in order to hold the workshop as a virtual meeting, then such costs can be eligible but it is necessary to deliver a short explanation for this (e.g., why no free versions could be used) in the budget part of the application.

The process of applying for Workshop Budget:

WHAT TO DO BEFORE YOU CAN START PLANNING YOUR WORKSHOP?

- 1) The NCC contacts CASTIEL WP3 (Martina Blazkova: martina.blazkova@bsc.es) and informs them that a workshop has been intended. If the topic is in line with the CASTIEL agenda, they agree on a date for the workshop and move on to Step 2.
- 2) You (the NCC) need to fill in the online [Application Form](#) available on EuroCC Access (please note that you need to be [logged in](#) to access the application form!), choose "Workshop" from the list of purposes and fill in your details and you also need to draft a workshop budget proposal and upload it as an annex to the application form.
- 3) The review of your application proceeds as follows: a) CASTIEL WP3 pre-selects the applications, b) Project Management Team (PMT) approves them, and c) the Financial Officer (FO) approves the budget. If your application is positively reviewed and the documents are approved, the FO Olga Podolskiy will block the budget at HLRS for your workshop and **officially notify you of this** – please wait for this confirmation before you start inviting speakers, guests and making any financial commitments!

WHAT TO DO AFTER THE BUDGET HAS BEEN SUCCESSFULLY BLOCKED?

- 4) The organising NCC is then responsible for: organising accommodation for the workshop presenter (if applicable), defining the agenda, and e.g. planning a suitable room and catering (if applicable, only for F2F workshops). You can ask CASTIEL WP3 to help you with the organisation, and to clarify any open issues which may arise. In case you have financial questions regarding the eligibility of costs or receipts at this stage, please ask Olga. You can reach both (CASTIEL WP3 and the FO) via the joint email address for workshop, twinning & mentoring budget: castiel-budget@lists.projects.hlrs.de!
- 5) **VERY IMPORTANT:** Remember that you need to **collect and keep** all **original receipts** regarding travel costs and catering or any other workshop expenses.

WHAT TO DO AFTER THE WORKSHOP TOOK PLACE?

- 6) After the workshop has been held, an Excel table overview with the copy of the original receipts and a copy of the approved Application Form together with the attendance list needs to be sent to castiel-budget@lists.projects.hlrs.de (Olga Podolskiy). Original invoices have to be kept by the NCC according to audit rules.
- 7) After the successful approval of the invoices, you (=the organising NCC) will receive a budget transfer up to the amount of the workshop expenses.

Mentoring & Twinning in CASTIEL's WP3

The detailed process for implementing the exchange programme and the selection criteria will follow the guidelines below.

Naming convention/Definitions:

Hosting NCC = NCC- mentor – the NCC which will conduct the mentoring or twinning activity

Mentee = NCC- mentee – the person who will receive the mentoring/twinning

Mentoring: NCC specialized/ experienced in a certain topic shares or trains another NCC on that topic. Mentor-mentee connections are established in order to enable in-depth counselling and joint problem solving in a one-to-one relationship typical to mentoring. This will also include visits to the respectively other institution for a number of days, if applicable.

Twinning: An activity between two NCCs from different countries to exchange best practices, courses, experience, or to implement a project together. In this case the relationship is a two-way exchange between a mentor and a mentee. Twinning partnerships will be established with the identification of one or several specific objectives that the twinning NCCs will commit to achieve. The actual knowledge skills and competence transfer will be adapted to each specific situation. This will also include visits to the respectively other institution for a number of days, if applicable.

1. The request for financial support is based on the **joint application** by a Mentee and a hosting NCC (see [Application Form on EuroCC Access](#) - please note that you need to be logged in to access the application form!), where you need to tick the respective box for either “Mentoring” or “Twinning” (**only one** application form has to be filled in and submitted for a mentor-mentee pair!).

- together with your application, you need to upload the budget draft

- and submit a short description ([Description Template](#)) of the exchange

2. This financial support is open to all NCCs.

3. Initially we planned several deadlines, in which NCCs could apply for financial support. However, to provide more flexibility, NCCs can now submit an application **at any time** a suitable and necessary Workshop/Twinning & Mentoring activity appears.

4. The selection criteria will also include the number of mentoring and twinning requests already granted to the sending NCC/both sending NCCs in case of twinning.

5. We plan to allow:

A. per face-to-face (F2F) stay:

- Up to 500 € travel costs for the mentee
- 500 € financial support per week per NCC mentee
- 250 € financial support per week for the NCC mentor to host an NCC mentee

For a 4-week F2F exchange, this corresponds to a financial support of up to 2500 Euro for the mentee and of 1000 € for the hosting NCC. If the stay is shorter, then the financial support is calculated according to the actual number of weeks.

B. per virtual “stay”:

- No travel costs for the mentee
- Up to 250 € financial support per week per NCC mentee
- 250 € financial support per week for the NCC mentor to host an NCC mentee

For a 4-week virtual exchange, this corresponds to a financial support of up to 1000 € for the Mentee and of 1000 € for the hosting NCC.

We have planned for around 90 F2F stays (and, respectively, more virtual stays) which sums up to a total of 315.000 € to be set aside within CASTIEL for this purpose.

6. Any additional costs arising shall be borne by the NCCs themselves.

7. While WP3 at CASTIEL is responsible for Twinning & Mentoring activities, the budget is blocked at USTUTT/HLRS, meaning that you (the NCC) need to apply for the budget – see the following section on how to apply.

8. The NCCs can always engage in an exchange without requesting financial support.

9. How to apply for mentoring of more than one mentee at the same time?

A. If two mentees plan to get mentoring **on the same topic** from the **same hosting NCC** (regardless whether the mentees are from the same NCC or not), it is possible, however the hosting NCC receives only the financial support for the max. 4-week stay equivalent to one mentee. Each mentee will receive his/her own financial mentee support. In this case you only need to submit one application and specify the number of mentees and their respective NCC.

B. If two (or more) mentees want to be mentored at **the same hosting NCC** (regardless whether they are from the same NCC or not) at the same time but the **mentoring occurs on different topics**, then you need to **submit two (or more) separate applications for each mentoring case** (i.e. one mentoring case = one mentoring topic). The financial support for the hosting NCC (max. amount for a 4-week period) then applies for each mentee with a differing mentoring topic (Example: two mentees with different mentoring needs at the same NCC = 2 x financial support for the hosting NCC/the NCC-mentor).

Figure 1 visualises the steps described above:

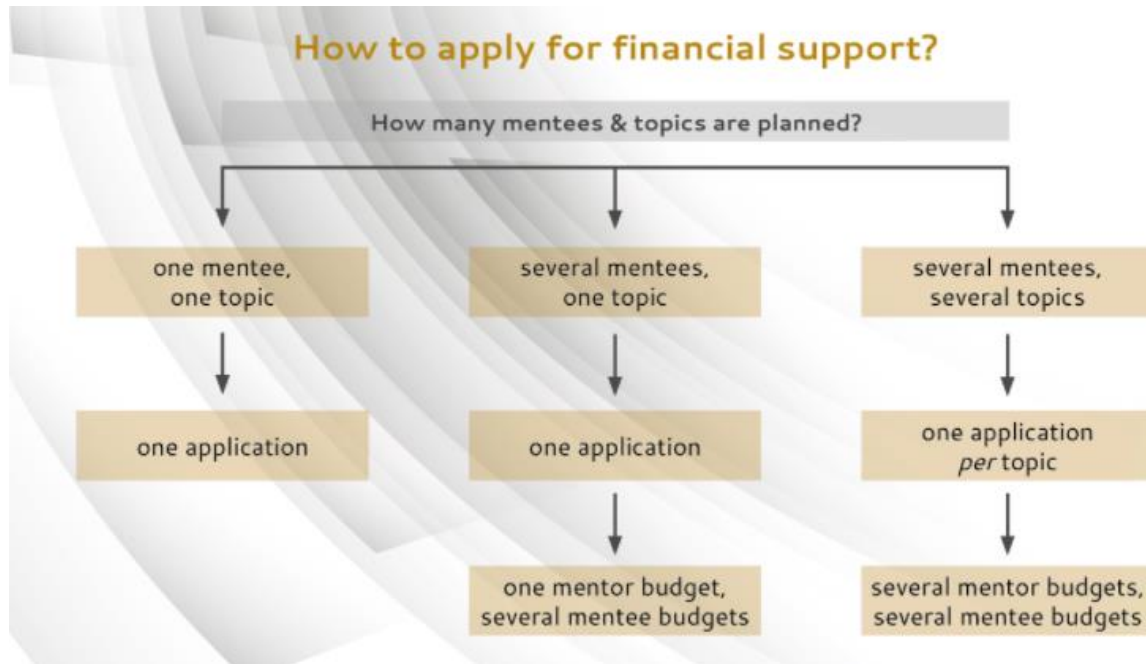


Figure 1: How to apply for financial support for mentoring activities.

The process of applying for Remuneration for Mentoring & Twinning:

WHAT TO DO BEFORE YOU CAN START PLANNING YOUR MENTORING OR TWINNING ACTIVITY?

1) You (the hosting NCC and the NCC Mentee) need to fill in the [online Application Form](#) on EuroCC Access (please note that you need to be logged in to access the application form!), choose "Mentoring" OR "Twinning" from the list of purposes and fill in your details. You also need to draft a budget proposal and the description ([Description Template](#)) of your planned exchange and upload it as an annex to the online application form. If you have questions about the application process, please contact castiel-budget@lists.projects.hlrs.de before submitting your application!

2) The short description of the planned exchange (max. 2 pages) should contain the following points:

Section 1. Your visit - preferred date to start your visit, its estimated duration, logistical matters such as accommodation and office space (in case of F2F) or in case of a virtual collaboration.

Section 2. Mentee motivation - justify your choice of the host and indicate what you expect to gain from this collaboration and what is your motivation for a visit.

Section 3. Host collaboration description - the level of support granted by the proposed host, what the host expects to gain from the collaboration and what is their motivation for hosting the mentee.

Section 4. A detailed description of the areas of planned support.

3) Straight after receiving the application(s), all applications will go through a review and selection procedure which can take up to one week' time. The review panel for the description of the exchange will consist of the staff in WP3 CASTIEL, and the financial side will be checked by Olga Podolskiy, the Financial Officer. The final approval comes from the PMT.

SELECTION PROCESS:

The panel members will base their judgement on a variety of factors, such as:

- The level of support from the host and the proposed areas for collaboration;
- The match of interests between the applicant and the proposed host;
- The number of requests already granted to the sending NCC.

Sometimes, the evaluators may recommend changing your proposed visit dates, extending or shortening the duration of your visit, or making some adjustments to the proposed work.

You will be notified of the decision shortly after the selection meeting.

4) If your application is positively reviewed by the reviewers, the finances have been checked by the FO and the PMT has approved the action, the FO will block the budget at HLRS for your mentoring or twinning activity and **officially notify you of this** – please wait for this confirmation before you start planning your mentoring or twinning activities and making any financial commitments!

WHAT TO DO AFTER YOUR ACTIVITY HAS BEEN APPROVED?

5) After the official approval from the FO is received, the NCC mentor/the hosting NCC is responsible for organizing all mentoring or twinning activities and for organizing accommodation for the Mentee (if applicable).

6) **VERY IMPORTANT:** Remember to **collect and keep all original receipts** regarding travel costs (if such costs occur, that is during an F2F mentoring/twinning activity. In case of virtual mentoring/twinning, it is assumed that no travel expenses occur).

WHAT TO DO AFTER THE MENTORING OR TWINNING ACTIVITY?

7) You need to prepare an Excel table overview of all expenses with the copy of travelling invoices and the copy of the approved request for financial support (the Application Form) and send them to the HLRS to the FO Olga Podolskiy (castiel-budget@lists.projects.hlrs.de).

8) The NCC mentor and the NCC mentee prepare a short report on the mentoring or twinning activity (see [Report Template](#)) and send it to castiel-budget@lists.projects.hlrs.de.

9) Original invoices have to be kept by the NCC according to audit rules!

10) After successful approval of the invoices, the NCC mentor will get a budget transfer up to the amount of the occurred expenses on the side of the hosting NCC and the mentee's NCC will receive a budget transfer up to the amount of the costs occurred on the side of the mentee.