

**Annex 5 : the LUMP-SUM approach**

As mentioned in the Call for Proposals, the “lump sum” method will be used to reimburse national level organisations for the work and time invested by their officers into specific activities which are part of their capacity building projects: the “lump sum” per activity will cover the organisation/preparatory work ahead of the activity/event, attendance and contribution to the event, and the following-up and reporting after the event. National beneficiaries will be requested to provide a list of participants, an agenda & invitation, and a brief report of the outcomes and results generated by every activity/event for which a lump sum is requested.

The methodology used for calculating the lump sum amount for different types of activities/events is hereby explained.

ETUC has calculated an average of daily salary costs (including social security contributions) per category of staff in national trade union organisations, based on 20 years’ experience of coordinating EU funded projects involving national trade union confederations as partners.

- The average daily salary cost of an administrative officer is estimated at 100 EUR.
- The average daily salary cost of a policy officer/trade union leader is estimated at 200 EUR.

Also based on past projects, ETUC has estimated the number of working days needed for managing (organising, implementing, following-up and reporting on) different types of events/activities. These estimates have allowed to set a realistic – and reasonable – lump-sum amount for each type of event/activity.

Different types and formats of events were considered, and a lump sum was set for each type, depending on the scale of the event (under 20 participants / over 20 participants / over 50 participants), depending on whether it is a national or a transnational event (so with, or without, interpretation and participants from abroad), and depending on the actual nature of the event (we differentiated among 2 types of events: information/coordination meetings or training courses).

<u>Type of event</u>	<u>estimate</u>	<u>Lump Sum</u>
<p style="text-align: center;"><b><u>“type-1” activity:</u></b>  <b><u>small-scale event (under 20 participants), online or physical</u></b></p> <p>This can include meetings such as social dialogue meetings, preparatory meeting / workshop with experts before a social dialogue meeting, internal meetings (coordination</p>		

and consultation meetings with members, working group meetings, etc), small dissemination & outreach events.		
<p><b><i>Type 1.1: small scale events with national participants only</i></b></p> <p>Based on past projects, such events could justify approximately 2 days of work for administrative staff (preparation of the logistics, sending out invitations, attendance &amp; admin support during the meeting) + approx. 4 days of work for policy staff (preparatory work on the contents, compiling and providing input on the working documents, attending and chairing the meeting, following-up and reporting on the outcomes).</p>	2 days of administrative staff + 4 days of policy staff	total Lump Sum: 1.000 EUR
<p><b><i>Type 1.2: small scale events with a transnational dimension</i></b> (with interpretation and international participants)</p> <p>The transnational dimension of an event would add extra workload to the administrative staff and policy staff (putting together a team of interpreters, signing a contract with them and processing their invoices, liaising with the non-national experts and participants, arranging hotel/accommodation for them, overseeing the translation of working documents, etc). All of the above justifies adding an extra 2 days for the administrative staff and an extra 1 day for the policy staff.</p>	4 days of administrative staff + 5 days of policy staff	total Lump Sum: 1.400 EUR
<p><b><u>“Type-2” activity:</u></b> <b><u>medium-scale event (more than 20 participants), online or physical</u></b></p>		
<p><b><i>Type 2.1: medium-scale events with national participants only</i></b></p>	4 days of administrative staff + 6 days of policy staff	total Lump Sum: 1.600 EUR
<p><b><i>Type 2.2: medium-scale events with a transnational dimension</i></b> (with interpretation and international participants)</p> <p>Same as above, with an extra 2 days for the administrative staff and an extra 1 day for the policy staff to reflect the transnational dimension of the event.</p>	6 days of admin staff + 7 days of policy staff	total Lump Sum: 2.000 EUR

<p style="text-align: center;"><b><u>“Type-3” activity:</u></b>  <b><u>Large-scale event (more than 50 participants), online or physical</u></b></p>		
<p><b><i>Type 3.1: Large-scale events with national participants only</i></b></p>	<p>6 days of administrative staff + 8 days of policy staff</p>	<p>total Lump Sum: 2.200 EUR</p>
<p><b><i>Type 3.2: Large-scale events with a transnational dimension</i></b>        (with interpretation and international participants).</p> <p>Same as above, with an extra 2 days for the administrative staff and an extra 1 day for the policy staff to reflect the transnational dimension of the event.</p>	<p>8 days of administrative staff + 9 days of policy staff</p>	<p>total Lump Sum: 2.600 EUR</p>
<p style="text-align: center;"><b><u>“Type-4” activity:</u></b>  <b><u>short trade union training courses (online or physical, carried-out over a maximum of 3 days)</u></b></p> <p>This requires trade union staff liaising with trainers/educators, to define the learning objectives, the training methodology and material, the delivery of the course, etc. This could justify a substantial number of days from policy staff in planning, preparing, delivering, reporting on, as well as from administrative staff in the preparation of the logistics, sending out invitations, attendance &amp; admin support during the training course.</p> <p>Policy staff: 4 days for preparation, 3 days overseeing and contributing to the course, 2 days following-up and reporting.</p> <p>Administrative staff: 2 days for preparation, 2 days processing invoices from suppliers and reimbursements from participants.</p>	<p>4 days of administrative staff + 9 days of policy staff</p>	<p>Lump Sum: 2.300 EUR</p>