



EUROPEAN COMMISSION
DG Employment, Social Affairs and Inclusion

Brussels,
EMPL.D.4

(date of notification)

Ms Georgette MULHEIR

LUMOS FOUNDATION LBG
BERRY STREET 12-14
LONDON EC1V 0AU
UNITED KINGDOM

Notification Letter One

Ref. No: VS/2011/0161

Accounting No: SI2.598413

(Please quote in all correspondence)

Title: TURING WORDS INTO ACTION: ENABLING THE RIGHTS AND INCLUSION
OF CHILDREN WITH INTELLECTUAL DISABILITIES IN EUROPE

Dear Madam,

Please find enclosed two copies of the above-mentioned agreement, which we are sending you for your examination and, if you approve their content, for signature (agreement and annexes).

If this is the case, could you please:

- sign both copies in the appropriate place;
- initial each page in the bottom right-hand corner;
- send both originals to the following postal address:

European Commission
DG Employment, Social Affairs and Inclusion
Unit EMPL.D.4
B-1049 Brussels, Belgium

We will send you as quickly as possible an original of the agreement signed by a representative of the European Commission. However, if you do not agree with the proposed agreement, we would ask you to inform us and to return the documents to the address above.

We would like to draw your attention to the fact that the Commission will not be able to accept the agreement:

- unless both original copies are returned to the above address, dated and duly signed by the authorised person referred to in the agreement, **within 15 calendar days** from the date of notification given in this letter;
- if the provisions of the agreement and/or its annexes have been amended in any way.

Yours faithfully,

Olivier ROULAND
Head of Unit

c.c.: Responsible official at DG EMPL.D.4: Ettore MARCHETTI



EUROPEAN COMMISSION

DG Employment, Social Affairs and Inclusion

Europe 2020: Social Policies
Demography, Migration, Social Innovation, Civil Society

Grant Agreement for an action

Agreement title **TURING WORDS INTO ACTION: ENABLING THE RIGHTS AND INCLUSION OF CHILDREN WITH INTELLECTUAL DISABILITIES IN EUROPE**

Agreement ref. no. **VS/2011/0161**
The above title and reference no. **must** be quoted in **all** correspondence with the Commission.

Beneficiary **LUMOS FOUNDATION LBG**

Other administrative information

Department **DG EMPL.D.4**

Call for proposals Ref. no.: VP/2010/007
Application Ref. no.: VP/2010/007/0035

Other accounting information

Commitment no. **SI2.598413**
This commitment no. **must** be quoted in correspondence relating to payments.

Type of Agreement **V/SB/ACG02**



EUROPEAN COMMISSION
DG Employment, Social Affairs and Inclusion

Europe 2020: Social Policies
Demography, Migration, Social Innovation, Civil Society

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Other accounting information

Commitment no. **SI2.598413**
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Type of Agreement **V/SB/ACG02**

The European Union (hereinafter referred to as **"the Union"**),
represented by the European Commission (hereinafter referred to as **"the Commission"**),
itself represented for the purposes of signature of this Agreement by Olivier ROULAND, Head
of Unit, EMPL.D.4, DG Employment, Social Affairs and Inclusion,

of the one part,

AND

LUMOS FOUNDATION LBG,
official legal form: COMPANY LIMITED BY GUARANTEE,
official registration no: 05611912/CH1112575,
official address in full: BERRY STREET 12-14, LONDON EC1V 0AU, UNITED KINGDOM,
VAT no: GB974383972
(**"the Beneficiary"**),
represented for the purposes of signature of this Agreement by Ms Georgette MULHEIR,
CEO,

of the other part,

HAVE AGREED

the **Special Conditions, General Conditions** and **Annexes** below:

- **Annex I** Description of the action
- **Annex II** Estimated budget of the action
- **Annex III** Technical implementation reports and financial statements to be submitted

which form an integral part of this Agreement (**"the Agreement"**).

The terms set out in the Special Conditions shall take precedence over those in the other parts of the Agreement.

The terms set out in the General Conditions shall take precedence over those in the Annexes.

I. Special conditions

Article I.1 Purpose of the Grant

I.1.1. The Commission has decided to award a grant, under the terms and conditions set out in the Special Conditions, the General Conditions and the Annexes to the agreement, which the beneficiary hereby declares that he has taken note of and accepts, for the action entitled TURING WORDS INTO ACTION: ENABLING THE RIGHTS AND INCLUSION OF CHILDREN WITH INTELLECTUAL DISABILITIES IN EUROPE (**"the action"**).

I.1.2. The Beneficiary accepts the grant and undertakes to do everything in his power to carry out the action as described in Annex I, acting on his own responsibility.

Article I.2 Duration

I.2.1. The Agreement shall enter into force on the date when the last of the two parties signs.

I.2.2. The action shall run for 18 months from 19/09/2011 (**"the starting date of the action"**).

Article I.3 Financing the action

I.3.1. Total cost of the action

The total cost of the action is estimated at EUR 224 588.22, as shown in the estimated budget in Annex II. The estimated budget shall give a detailed breakdown of the costs that are eligible for Union funding under the terms of Article II. 14, of any other costs that the action may entail, and of all receipts, so that receipts and costs balance.

I.3.2. Eligible costs

The total eligible costs of the action for which the Commission grant is awarded are estimated at EUR 224 588.22, as shown in the estimated budget in Annex II.

Indirect costs are eligible for flat-rate funding of 7% of the total direct costs eligible, subject to the conditions laid down in Article II. 14.3.

I.3.3. Amount of the grant

The Commission shall contribute a maximum of EUR 179 588.22 equivalent to 79.96% of the estimated total eligible costs indicated in paragraph 2. The final amount of the grant shall be determined as specified in Article II. 17, without prejudice to Article II. 19.

The Union grant may not finance the entire costs of the action. The amounts and sources of co-financing other than from Union funds shall be set out in the estimated budget referred to in paragraph 1.

I.3.4. Adjustment of the estimated budget

By way of derogation from Article II. 13, the Beneficiary may, when carrying out the action, adjust the estimated budget by transfers between headings of eligible costs, provided that this adjustment of expenditure does not affect implementation of the action and the transfer between headings does not exceed 10% of the amount of each heading of estimated eligible costs for which the transfer is intended, and without exceeding the total eligible costs indicated in paragraph 2. He shall inform the Commission in writing.

Article I.4 Payment arrangements

I.4.1. Pre-financing

Within 45 days of the date when the last of the two parties signs the Agreement a pre-financing payment shall be made to the Beneficiary, representing 30% of the amount specified in Article I.3.3.

I.4.2. Further pre-financing payments

Pre-financing may be paid in several instalments. In that case, payment of each further instalment may not be made until at least 70% of the previous pre-financing payment has been used up.

Every request for payment of a further pre-financing instalment must be accompanied by the documents specified in Article II.15.2 and by a progress report on the action's implementation.

Within 45 days after the Commission receives the request for payment of a further instalment, together with the documents referred to in the previous subparagraph, a pre-financing payment shall be made to the Beneficiary, equivalent to 40% of the amount specified in Article I.3.3.

I.4.3. Payment of the balance

The request for payment of the balance shall be accompanied by the final technical implementation report and financial statement specified in Article II.15.4 and by a certificate on the action's financial statements and underlying accounts.

The Commission shall have 60 days to approve or reject the technical implementation report or to request additional supporting documents or information under the procedure laid down in Article II.15.4. In that case the Beneficiary shall have 30 days to submit the additional information or a new report.

A payment representing the balance of the grant determined in accordance with Article II.17 shall be made to the Beneficiary within 45 days following approval by the Commission of the technical implementation report accompanying the request for payment of the balance. The Commission may suspend the period for payment in accordance with the procedure in Article II.16.2.

Article I.5 Submission of reports and other documents

The technical implementation reports, financial statements and other documents referred to in Article I.4 must be submitted in 3 copies in English on the following dates:

- Progress report on the action's implementation and detailed statement of the costs incurred: at the request for further pre-financing payment and, at the latest, within 2 months following the date when the utilisation of pre-financing reaches the level specified in Article I.4.2;
- Final technical implementation report and financial statement: at the request for final payment and, at the latest, within 3 months following the closing date of the action specified in Article I.2.2.

The final technical implementation report and an executive summary must be completed using the template contained in Annex III of this agreement. They must be submitted with the accompanying documents on paper and in electronic format as indicated in the template.

The final financial statement of the costs actually incurred, which should be annexed to the final payment request, in accordance with Art. II 15.4, must be drawn up in euro by the beneficiary. If necessary, the actual costs incurred may be converted into euro using the monthly accounting rate for the month in which the final payment request is sent. This rate is set by the European Commission and published on its internet site (<http://ec.europa.eu/budget/inforeuro/index.cfm>).

Article I.6 Bank account

Payments shall be made to the Beneficiary's bank account or sub-account denominated in euros ¹, as indicated below ²:

- name of bank: HSBC BANK PLC
- address of branch: 22, VICTORIA STREET, LONDON, UNITED KINGDOM
- exact designation of account holder: LUMOS FOUNDATION NO ONE
- full account number including codes: IBAN_ONLY
- IBAN or, if non available, BIC or SWIFT code:

This account or sub-account must identify the payments made by the Commission. Moreover, the funds paid to this account or sub-account shall yield interest or equivalent benefits under the law of the State on whose territory the account or sub-account is opened. Such interest or benefits shall, if they are generated by pre-financing, be deducted from the payment of the balance or recovered by the Commission as specified in Article II.16.4.

Article I.7 General administrative provisions

Any communication in connection with this Agreement shall be in writing, indicating the number of the Agreement, and shall be sent to the following addresses:

For the Commission

European Commission
Directorate-General Employment, Social Affairs and Inclusion
EMPL.D.4
B-1049 Bruxelles (Belgium)

Ordinary mail shall be considered to have been received by the Commission on the date on which it is formally registered by the Commission unit responsible referred to above.

For the Beneficiary

Ms Georgette MULHEIR
CEO
LUMOS FOUNDATION LBG
BERRY STREET 12-14
LONDON EC1V 0AU
UNITED KINGDOM

Any change of address by the beneficiary shall be communicated in writing to the Commission.

Article I.8 Law applicable and competent court

The grant is governed by the terms of the Agreement, the Union law applicable and, on a subsidiary basis, by the law of Belgium relating to grants.

The beneficiary may bring legal proceedings regarding decisions by the Commission concerning the application of the provisions of the agreement and the arrangements for implementing it, before the General Court of the European Union and, in the event of appeal, the Court of Justice.

Article I.9 Data protection

1. Any personal data included in the agreement shall be processed pursuant to Regulation (EC) No 45/2001 of the European Parliament and of the Council on the protection of individuals with regard to

¹ Except in the case of bank accounts in countries that do not accept euro transactions.

² As shown by the account identification document issued or certified by the bank concerned.

the processing of personal data by the Community institutions and bodies and on the free movement of such data. Such data shall be processed solely for the purposes of the implementation, management and monitoring of the agreement by DG Employment, Social Affairs and Inclusion, without prejudice to possible transmission to the bodies charged with monitoring or inspection task in application of Union law.

2. The beneficiary shall have the right of access to his/her personal data and the right to rectify any such data. Should the beneficiary have any queries concerning the processing of his/her personal data, he/she shall address them to DG Employment, Social Affairs and Inclusion.

3. The beneficiary shall have the right of recourse at any time to the European Data Protection Supervisor.

4. Where the agreement requires the processing of personal data by the beneficiary, the beneficiary may act only under the supervision of the data controller, in particular with regard to the purposes of the processing, the categories of data which may be processed, the recipients of the data, and the means by which the data subject may exercise his/her rights.

5. The beneficiary shall limit access to the data to the staff strictly necessary for the implementation, management and monitoring of the agreement.

6. The beneficiary undertakes to adopt appropriate technical and organisational security measures having regard to the risks inherent in the processing and to the nature of the personal data concerned in order to:

- a) prevent any unauthorised person from having access to computer systems processing personal data, and especially:
 - i) unauthorised reading, copying, alteration or removal of storage media;
 - ii) unauthorised data input as well as any unauthorised disclosure, alteration or erasure of stored personal data;
 - iii) unauthorised persons from using data-processing systems by means of data transmission facilities;
- b) ensure that authorised users of a data-processing system can access only the personal data to which their access right refers;
- c) record which personal data have been communicated, when and to whom;
- d) ensure that personal data being processed on behalf of third parties can be processed only in the manner prescribed by the contracting institution or body;
- e) ensure that, during communication of personal data and transport of storage media, the data cannot be read, copied or erased without authorisation;
- f) design its organisational structure in such a way that it meets data protection requirements.

II. General conditions

PART A Legal and administrative provisions

Article II.1 Liability

II.1.1. The beneficiary shall have sole responsibility for complying with any legal obligations incumbent on him.

II.1.2. The Commission shall not, in any circumstances or on any grounds, be held liable in the event of a claim under the agreement relating to any damage caused during the action's execution. Consequently, the Commission will not entertain any request for indemnity or reimbursement accompanying any such claim.

II.1.3. Except in cases of *force majeure*, the beneficiary shall make good any damage sustained by the Commission as a result of the execution or faulty execution of the action.

II.1.4. The beneficiary shall bear sole liability vis-à-vis third parties, including for damage of any kind sustained by them while the action is being carried out.

Article II.2 Conflict of Interests

The beneficiary undertakes to take all the necessary measures to prevent any risk of conflicts of interests which could affect the impartial and objective performance of the agreement. Such conflict of interests could arise in particular as a result of economic interest, political or national affinity, family or emotional reasons, or any other shared interest.

Any situation constituting or likely to lead to a conflict of interests during the performance of the agreement must be brought to the attention of the Commission, in writing, without delay. The beneficiary shall undertake to take whatever steps are necessary to rectify this situation at once.

The Commission reserves the right to check that the measures taken are appropriate and may demand that the beneficiary take additional measures, if necessary, within a certain time.

Article II.3 Ownership/Use of the Results

II.3.1. Unless stipulated otherwise in this agreement, ownership of the results of the action, including industrial and intellectual property rights, and of the reports and other documents relating to it, shall be vested in the beneficiary.

II.3.2. Without prejudice to paragraph 1, the beneficiary grants the Commission the right to make free use of the results of the action as it deems fit, and, in particular, to display, reproduce by any technical procedure, translate or communicate the results of the action by any medium, including on the Europa website, provided it does not thereby breach its confidentiality obligations or existing industrial and intellectual property rights.

II.3.3. Where industrial and intellectual property rights, including rights of third parties, exist prior to the agreement being entered into ("pre-existing intellectual property rights"), the beneficiary shall establish a list which shall specify all rights of ownership and use in the pre-existing intellectual property rights and disclose it to the Commission at the latest prior to the commencement of implementation. The beneficiary shall ensure that it has all rights to use any pre-existing intellectual property rights in implementation of the agreement.

Article II.4 Confidentiality

The Commission and the beneficiary undertake to preserve the confidentiality of any document, information or other material directly related to the subject of the agreement that is duly classed as confidential, if disclosure could cause prejudice to the other party. The parties shall remain bound by this obligation beyond the closing date of the action.

Article II.5 Publicity

II.5.1. Unless the Commission requests otherwise, any communication or publication by the beneficiary about the action, including at a conference or seminar, shall indicate that the action has received funding from the Union.

Any communication or publication by the beneficiary, in any form and medium, shall indicate that sole responsibility lies with the author and that the Commission is not responsible for any use that may be made of the information contained therein.

II.5.2. The beneficiary authorises the Commission to publish the following information in any form and medium, including via the Internet:

- the beneficiary's name and the address,
- the subject and purpose of the grant,
- the amount granted and the proportion of the action's total cost covered by the funding.

Upon a reasoned and duly substantiated request by the beneficiary, the Commission may agree to forgo such publicity if disclosure of the information indicated above would risk compromising the beneficiary's security or prejudicing his commercial interests.

Article II.6 Evaluation

Whenever the Commission carries out an interim or final evaluation of the action's impact measured against the objectives of the Union programme concerned, the beneficiary undertakes to make available to the Commission and/or persons authorised by it all such documents or information as will allow the evaluation to be successfully completed and to give them the rights of access specified in Article II.19.

Article II.7 Suspension

II.7.1. The beneficiary may suspend implementation of the action if exceptional circumstances make this impossible or excessively difficult, notably in the event of *force majeure*. He shall inform the Commission without delay, giving all the necessary reasons and details and the foreseeable date of resumption.

II.7.2. If the Commission does not terminate the agreement under Article II.11.2, the beneficiary shall resume implementation once circumstances allow and shall inform the Commission accordingly. The duration of the action shall be extended by a period equivalent to the length of the suspension. In accordance with Article II.13, a supplementary written agreement shall be concluded to extend the duration of the action and to make any amendments that may be necessary to adapt the action to the new implementing conditions.

Article II.8 Force Majeure

II.8.1. *Force majeure* shall mean any unforeseeable exceptional situation or event beyond the parties' control which prevents either of them from fulfilling any of their obligations under this agreement, was not attributable to error or negligence on their part, and proves insurmountable in spite of all due diligence. Defects in equipment or material or delays in making them available (unless

due to *force majeure*), labour disputes, strikes or financial difficulties cannot be invoked as *force majeure* by the defaulting party.

II.8.2. A party faced with *force majeure* shall inform the other party without delay by registered letter with advice of delivery or equivalent, stating the nature, probable duration and foreseeable effects.

II.8.3. Neither of the parties shall be held in breach of their obligations under the agreement if they are prevented from fulfilling them by *force majeure*. The parties shall make every effort to minimise any damage due to *force majeure*.

II.8.4. The action may be suspended in accordance with Article II.7.

Article II.9 Award of Contracts

II.9.1. If the beneficiary has to conclude contracts in order to carry out the action and they constitute costs of the action under an item of eligible direct costs in the estimated budget, he shall award the contract to the bid offering best value for money; in doing so he shall observe the principles of transparency and equal treatment of potential contractors and shall take care to avoid any conflict of interests.

II.9.2. Contracts as referred to in paragraph 1 may be awarded only in the following cases:

- (a) they may only cover the execution of a limited part of the action;
- (b) recourse to the award of contracts must be justified having regard to the nature of the action and what is necessary for its implementation;
- (c) the tasks concerned must be set out in Annex I and the corresponding estimated costs must be set out in detail in the budget in Annex II;
- (d) any recourse to the award of contracts while the action is under way, if not provided for in the initial grant application, shall be subject to prior written authorisation by the Commission;
- (e) the beneficiary shall retain sole responsibility for carrying out the action and for compliance with the provisions of the agreement. The beneficiary must undertake to make the necessary arrangements to ensure that the contractor waives all rights in respect of the Commission under the agreement;
- (f) the beneficiary must undertake to ensure that the conditions applicable to him under Articles II.1, II.2, II.3, II.4, II.5, II.6, II.10 and II.19 of the agreement are also applicable to the contractor.

Article II.10 Assignment

Claims against the Commission may not be transferred.

In exceptional circumstances, where the situation warrants it, the Commission may authorise the assignment of the agreement, or part thereof, and payments flowing from it to a third party, following a written request to that effect, giving reasons, from the beneficiary. If the Commission agrees, it must make its agreement known in writing before the proposed assignment takes place. In the absence of the above authorisation, or in the event of failure to observe the terms thereof, the assignment shall not be enforceable against and shall have no effect on the Commission.

In no circumstances shall such an assignment release the beneficiary from his obligations to the Commission.

Article II.11 Termination of the Agreement

II.11.1. Termination by the beneficiary

In duly justified cases, the beneficiary may withdraw his request for a grant and terminate the agreement at any time by giving 60 days' written notice stating the reasons, without being required to furnish any indemnity on this account. If no reasons are given or if the Commission does not accept the reasons, the beneficiary shall be deemed to have terminated this agreement improperly, with the consequences set out in the third subparagraph of paragraph 4.

II.11.2. Termination by the Commission

The Commission may decide to terminate the agreement, without any indemnity on its part, in the following circumstances:

- (a) in the event of a change to the beneficiary's legal, financial, technical, organisational or ownership situation that is liable to affect the agreement substantially or to call into question the decision to award the grant;
- (b) if the beneficiary fails to fulfil a substantial obligation incumbent on him under the terms of the agreement, including its annexes;
- (c) in the event of *force majeure*, notified in accordance with Article II.8, or if the action has been suspended as a result of exceptional circumstances, notified in accordance with Article II.7;
- (d) if the beneficiary is declared bankrupt, is being wound up, is having his affairs administered by the courts, has entered into an arrangement with creditors, has suspended business activities, is the subject of any other similar proceedings concerning those matters, or is in an analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (e) where the Commission has evidence or seriously suspects the beneficiary or any related entity or person, of professional misconduct;
- (f) if the beneficiary has not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which it is established;
- (g) where the Commission has evidence or seriously suspects the beneficiary or any related entity or person, of fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Union's financial interests;
- (h) where the Commission has evidence or seriously suspects the beneficiary or any related entity or person, of substantial errors, irregularities or fraud in the award procedure or the performance of the grant;
- (i) if the beneficiary has made false declarations or submits reports inconsistent with reality to obtain the grant provided for in the agreement.

In the cases referred to in points (e), (g) and (h) above, any related person shall mean any physical person with powers of representation, decision-making or control in relation to the beneficiary. Any related entity shall mean in particular any entity which meets the criteria laid down by Article 1 of the Seventh Council Directive n° 83/349/EEC of 13 June 1983.

II.11.3. Termination procedure

The procedure is initiated by registered letter with advice of delivery or equivalent.

In the cases referred to in points (a), (b), (d), (e), (g) and (h) above, the beneficiary shall have 30 days to submit his observations and take any measures necessary to ensure continued fulfilment of his obligations under the agreement. If the Commission fails to confirm acceptance of these observations by giving written approval within 30 days of receiving them, the termination procedure shall continue to run.

Where notice is given, termination shall take effect at the end of the period of notice, which shall start to run from the date when notification of the Commission's decision to terminate the agreement is received.

If notice is not given in the cases referred to in points (c), (f) and (i) above, termination shall take effect from the day following the date on which notification of the Commission's decision to terminate the agreement is received.

II.11.4. Effects of termination

In the event of termination, payments by the Commission shall be limited to the eligible costs actually incurred by the beneficiary up to the date when termination takes effect, in accordance with Article II.17. Costs relating to current commitments that are not due to be executed until after termination shall not be taken into account.

The beneficiary shall have 60 days from the date when termination takes effect, as notified by the Commission, to produce a request for final payment in accordance with Article II.15.4. If no request for final payment is received within this time limit, the Commission shall not reimburse the expenditure incurred by the beneficiary up to the date of termination and it shall recover any amount if its use is not

substantiated by the technical implementation reports and financial statements approved by the Commission.

By way of exception, at the end of the period of notice referred to in paragraph 3, where the Commission is terminating the agreement on the grounds that the beneficiary has failed to produce the final technical implementation report and financial statement within the deadline stipulated in Article 1.5 and the beneficiary has still not complied with this obligation within two months following the written reminder sent by the Commission by registered letter with advice of delivery or equivalent, the Commission shall not reimburse the expenditure incurred by the beneficiary up to the date on which the action ended and it shall recover any amount if its use is not substantiated by the technical implementation reports and financial statements approved by the Commission.

By way of exception, in the event of improper termination by the beneficiary or termination by the Commission on the grounds set out in points (a), (e), (g), (h) or (i) above, the Commission may require the partial or total repayment of sums already paid under the agreement on the basis of technical implementation reports and financial statements approved by the Commission, in proportion to the gravity of the failings in question and after allowing the beneficiary to submit his observations.

Article II.12 Financial Penalties

By virtue of the Financial Regulation applicable to the general budget of the European Communities, any beneficiary declared to be in grave breach of his obligations shall be liable to financial penalties of between 2% and 10% of the value of the grant in question, with due regard for the principle of proportionality.

This rate may be increased to between 4% and 20% in the event of a repeated breach in the five years following the first.

The beneficiary shall be notified in writing of any decision by the Commission to apply such financial penalties.

Article II.13 Supplementary Agreements

II.13.1. Any amendment to the grant conditions must be the subject of a written supplementary agreement. No oral agreement may bind the parties to this effect.

II.13.2. The supplementary agreement may not have the purpose or the effect of making changes to the agreement which might call into question the decision awarding the grant or result in unequal treatment of applicants.

II.13.3. If the request for amendment is made by the beneficiary, he must send it to the Commission in good time before it is due to take effect and at all events one month before the closing date of the action, except in cases duly substantiated by the beneficiary and accepted by the Commission.

PART B Financial Provisions

Article II.14 Eligible Costs

II.14.1. Eligible costs of the action are costs actually incurred by the beneficiary, which meet the following criteria:

- they are incurred during the duration of the action as specified in Article 1.2.2. of the agreement, with the exception of costs relating to final reports and certificates on the action's financial statements and underlying accounts;
- they are connected with the subject of the agreement and they are indicated in the estimated overall budget of the action;
- they are necessary for the implementation of the action which is the subject of the grant;
- they are identifiable and verifiable, in particular being recorded in the accounting records of the beneficiary and determined according to the applicable accounting standards of the

- country where the beneficiary is established and according to the usual cost-accounting practices of the beneficiary;
- they comply with the requirements of applicable tax and social legislation;
- they are reasonable, justified, and comply with the requirements of sound financial management, in particular regarding economy and efficiency.

The beneficiary's accounting and internal auditing procedures must permit direct reconciliation of the costs and revenue declared in respect of the action with the corresponding accounting statements and supporting documents.

II.14.2. The eligible direct costs for the action are those costs which, with due regard for the conditions of eligibility set out in Article II.14.1, are identifiable as specific costs directly linked to performance of the action and which can therefore be booked to it direct. In particular, the following direct costs are eligible provided that they satisfy the criteria set out in the previous paragraph:

- the cost of staff assigned to the action, comprising actual salaries plus social security charges and other statutory costs included in the remuneration, provided that this does not exceed the average rates corresponding to the beneficiary's usual policy on remuneration;

The corresponding salary costs of personnel of national administrations are eligible to the extent that they relate to the cost of activities which the relevant public authority would not carry out if the project concerned were not undertaken;

- travel and subsistence allowances for staff taking part in the action, provided that they are in line with the beneficiary's usual practices on travel costs or do not exceed the scales approved annually by the Commission;
- the purchase cost of equipment (new or second-hand), provided that it is written off in accordance with the tax and accounting rules applicable to the beneficiary and generally accepted for items of the same kind. Only the portion of the equipment's depreciation corresponding to the duration of the action and the rate of actual use for the purposes of the action may be taken into account by the Commission, except where the nature and/or the context of its use justifies different treatment by the Commission;
- costs of consumables and supplies, provided that they are identifiable and assigned to the action;
- costs entailed by other contracts awarded by the beneficiary for the purposes of carrying out the action, provided that the conditions laid down in Article II.9 are met;
- costs arising directly from requirements imposed by the agreement (dissemination of information, specific evaluation of the action, audits, translations, reproduction, etc.), including the costs of any financial services (especially the cost of financial guarantees).

II.14.3. The eligible indirect costs for the action are those costs which, with due regard for the conditions of eligibility described in Article II.14.1, are not identifiable as specific costs directly linked to performance of the action which can be booked to it direct, but which can be identified and justified by the beneficiary using his accounting system as having been incurred in connection with the eligible direct costs for the action. They may not include any eligible direct costs.

By way of derogation from Article II.14.1, the indirect costs incurred in carrying out the action may be eligible for flat-rate funding fixed at not more than 7% of the total eligible direct costs. If provision is made in Article I.3.2 for flat-rate funding in respect of indirect costs, they need not be supported by accounting documents.

II.14.4. The following costs shall not be considered eligible:

- return on capital;
- debt and debt service charges;
- provisions for losses or potential future liabilities;
- interest owed;
- doubtful debts;
- exchange losses;
- VAT, unless the beneficiary can show that he is unable to recover it according to the applicable national legislation. VAT paid by public bodies is not an eligible cost.
- costs declared by the beneficiary and covered by another action or work programme receiving a Union grant;
- excessive or reckless expenditure.

II.14.5. Contributions in kind shall not constitute eligible costs. However, the Commission can accept, if considered necessary or appropriate, that the co-financing of the action referred to in Article I.3.3 should be made up entirely or in part of contributions in kind. In this case, the value calculated for such contributions must not exceed:

- the costs actually borne and duly supported by accounting documents of the third parties who made these contributions to the beneficiary free of charge but bear the corresponding costs;
- the costs generally accepted on the market in question for the type of contribution concerned when no costs are borne.

Contributions involving buildings shall not be covered by this possibility.

In the case of co-financing in kind, a financial value shall be placed on the contributions and the same amount will be included in the costs of the action as ineligible costs and in receipts from the action as co-financing in kind. The beneficiary shall undertake to obtain these contributions as provided for in the agreement.

II.14.6. By way of derogation from paragraph 3, indirect costs shall not be eligible under an action grant awarded to a beneficiary who already receives an operating grant from the Commission during the period in question.

Article II.15 Requests for Payment

Payments shall be made in accordance with Article I.4 of the Special Conditions.

II.15.1. *Pre-financing*

Pre-financing is intended to provide the beneficiary with a float.

Where required by the provisions of Article I.4 on pre-financing, the beneficiary shall provide a financial guarantee from a bank or an approved financial institution established in one of the Member States of the Union.

The guarantor shall stand as first demand guarantor and shall not require the Commission to have recourse against the principal debtor (the beneficiary).

The financial guarantee shall provide that it remains in force until the pre-financing is cleared against interim payment(s) or payment of the balance by the Commission to the beneficiary or, in the absence of such clearing, three months after a recovery is notified to the beneficiary by which the Commissions asks him to repay the pre-financing. The Commission undertakes to release the guarantee within the following month.

II.15.2. *Further pre-financing payments*

Where pre-financing is divided into several instalments, the beneficiary may request a further pre-financing payment once he has used up the percentage of the previous payment specified in the provisions of Article I.4 on further pre-financing. The request shall be accompanied by the following documents:

- a detailed statement of the eligible costs actually incurred;
- where required by the above-mentioned provisions of Article I.4, a financial guarantee in accordance with paragraph 1;
- where required by the above-mentioned provisions of Article I.4, a certificate on the action's financial statements and underlying accounts, produced by an approved auditor or, in case of public bodies, by a competent and independent public officer;
- any other documents in support of his request that may be required in support of the request for further pre-financing payments.

The documents accompanying the request for payment shall be drawn up in accordance with the relevant provisions in Article I.5 and the annexes.

II.15.3. Interim payments

Interim payments are intended to reimburse the beneficiary for expenditure on the basis of a detailed statement of the costs incurred, once the action has reached a certain level of completion. It may clear all or part of any pre-financing.

By the appropriate deadline indicated in Article I.5, the beneficiary shall submit a request for interim payment accompanied by the following documents:

- an interim report on implementation of the action;
- an interim financial statement of the eligible costs actually incurred, following the structure of the estimated budget;
- where required by the provisions of Article I.4 on interim payment, a certificate on the action's financial statements and underlying accounts, produced by an approved auditor or, in case of public bodies, by a competent and independent public officer. The purpose of the audit shall certify, in accordance with a methodology approved by the Commission, that the costs declared by the beneficiary in the financial statements on which the request of payment is based are real, accurately recorded and eligible and that all receipts have been declared, in accordance with the agreement.

The documents accompanying the request for payment shall be drawn up in accordance with the relevant provisions in Article I.5 and the annexes. The beneficiary shall certify that the information provided in his request for payment is full, reliable and true. He shall also certify that the costs incurred can be considered eligible in accordance with the agreement, that all receipts have been declared, and that his request for payment is substantiated by adequate supporting documents that can be checked.

On receipt of these documents, the Commission shall have the period specified in Article I.4 in order to:

- approve the interim report on implementation of the action;
- ask the beneficiary for supporting documents or any additional information it deems necessary to allow the approval of the report;
- reject the report and ask for the submission of a new report.

Failing a written reply from the Commission within the time limit for scrutiny indicated above, the report shall be deemed to have been approved. Approval of the report accompanying the request for payment shall not imply recognition of the regularity or of the authenticity, completeness and correctness of the declarations and information it contains.

Requests for additional information or a new report shall be notified to the beneficiary in writing.

If additional information or a new report is requested, the time limit for scrutiny shall be extended by the time it takes to obtain this information. The beneficiary shall be informed of that request and the extension of the delay for scrutiny by means of a formal document. The beneficiary shall have the period laid down in Article I.4 to submit the information or new documents requested.

Extension of the delay for approval of the report may delay the payment by the equivalent time.

Where a report is rejected and a new report requested, the approval procedure described in this article shall apply.

In the event of renewed rejection, the Commission reserves the right to terminate the agreement by invoking Article II.11.2(b).

II.15.4. Payment of the balance

Payment of the balance, which may not be repeated, is made after the end of the action on the basis of the costs actually incurred by the beneficiary in carrying out the action. It may take the form of a recovery order where the total amount of earlier payments is greater than the amount of the final grant determined in accordance with Article II.17.

By the appropriate deadline indicated in Article I.5, the beneficiary shall submit a request for payment of the balance accompanied by the following documents:

- a final report on the implementation of the action;
- a final financial statement of the eligible costs actually incurred, following the structure of the estimated budget;
- a full summary statement of the receipts and expenditure of the action;
- where required by the provisions of Article I.4 on payment of the balance, a certificate on the action's financial statements and underlying accounts, produced by an approved auditor, or in case of public bodies by a competent and independent public officer. The certificate shall certify, in accordance with a methodology approved by the Commission, that the costs declared by the beneficiary in the financial statements on which the request of payment is based are real, accurately recorded and eligible and that all receipts have been declared, in accordance with the agreement.

The documents accompanying the request for payment shall be drawn up in accordance with the provisions of Article I.5 and the annexes. The beneficiary shall certify that the information provided in his request for payment is full, reliable and true. He shall also certify that the costs incurred can be considered eligible in accordance with the agreement, that all receipts have been declared, and that his request for payment is substantiated by adequate supporting documents that can be checked.

On receipt of these documents, the Commission shall have the period specified in Article I.4 in order to:

- approve the final report on implementation of the action;
- ask the beneficiary for supporting documents or any additional information it deems necessary to allow the approval of the report;
- reject the report and ask for the submission of a new report.

Failing a written reply from the Commission within the time limit for scrutiny indicated above, the report shall be deemed to have been approved. Approval of the report accompanying the request for payment shall not imply recognition of the regularity or of the authenticity, completeness and correctness of the declarations and information it contains.

Requests for additional information or a new report shall be notified to the beneficiary in writing.

If additional information or a new report is requested, the time limit for scrutiny shall be extended by the time it takes to obtain this information. The beneficiary shall be informed of that request and the extension of the delay for scrutiny by means of a formal document. The beneficiary shall have the period laid down in Article I.4 to submit the information or new documents requested.

Extension of the delay for approval of the report may delay the payment by the equivalent time.

Where a report is rejected and a new report requested, the approval procedure described in this article shall apply.

In the event of renewed rejection, the Commission reserves the right to terminate the agreement by invoking Article II.11.2(b).

II.15.5 Payment currency and costs of transfers

Costs of the transfers are borne in the following way:

- costs of dispatch charged by the bank of the Commission shall be borne by the Commission;
- costs of receipt charged by the bank of the beneficiary shall be borne by the beneficiary;
- all costs of repeated transfers caused by one of the parties shall be borne by the party who caused repetition of the transfer.

Article II.16 General Provisions on Payments

II.16.1. Payments shall be made by the Commission in euro. Any conversion of actual costs into euro shall be made at the daily rate published in the Official Journal of the European Union or, failing that, at the monthly accounting rate established by the Commission and published on its website applicable

on the day when the payment order is issued by the Commission, unless the Special Conditions of the agreement lay down specific provisions.

Payments by the Commission shall be deemed to be effected on the date when they are debited to the Commission's account.

II.16.2. The Commission may suspend the period for payment laid down in Article I.4 at any time for the purposes of additional checks by notifying the beneficiary that his request for payment cannot be met, either because it does not comply with the provisions of the agreement, or because the appropriate supporting documents have not been produced or because there is a suspicion that some of the expenses in the financial statement are not eligible.

The Commission may suspend its payments at any time if the beneficiary is found or presumed to have *infringed the provisions* of the agreement, in particular in the wake of the audits and checks provided for in Article II.19.

The Commission may also suspend its payments:

- if there is a suspicion of irregularity committed by the beneficiary in the implementation of the grant agreement;
- if there is a suspected or established irregularity committed by the beneficiary in the implementation of another grant agreement or grant decision funded by the General Budget of the Union or by any other budget managed by it. In such cases, suspension of the payments will only proceed where the suspected or established irregularity can affect the implementation of the current grant agreement.

The Commission shall inform the beneficiary as soon as possible of any such suspension by registered letter with acknowledgement of receipt or equivalent, setting out the reasons for suspension.

Suspension shall take effect on the date when notice is sent by the Commission. The remaining payment period shall start to run again from the date when a properly constituted request for payment is registered, when the supporting documents requested are received, or at the end of the suspension period as notified by the Commission.

II.16.3. On expiry of the period for payment specified in Article I.4, and without prejudice to paragraph 2 of this Article, the beneficiary is entitled to interest on the late payment at the rate applied by the European Central Bank for its main refinancing operations in euros, plus three and a half points; the reference rate to which the increase applies shall be the rate in force on the first day of the month of the final date for payment, as published in the C series of the Official Journal of the European Union. This provision shall not apply to recipients of a grant which are public authorities of the Member States of the Union.

Interest on late payment shall cover the period from the final date for payment, exclusive, up to the date of payment as defined in paragraph 1, inclusive. The interest shall not be treated as a receipt for the action for the purposes of determining the final grant within the meaning of Article II.17.4. The suspension of payment by the Commission may not be considered as late payment.

By way of exception, when the interest calculated in accordance with the provisions of the first and second subparagraphs is lower than or equal to EUR 200, it shall be paid to the beneficiary only upon demand submitted within two months of receiving late payment.

II.16.4. The Commission shall deduct the interest yielded by pre-financing which exceeds EUR 50 000, as provided for in Article I.4, from the payment of the balance of the amount due to the beneficiary. The interest shall not be treated as a receipt for the action within the meaning of Article II.17.4.

Where the pre-financing payments exceed EUR 750 000 per agreement at the end of each financial year, the interest shall be recovered for each reporting period. Taking account of the risks associated with the management environment and the nature of actions financed, the Commission may recover the interest generated by pre-financing lower than EUR 750 000 at least once a year.

Where the interest yielded exceeds the balance of the amount due to the beneficiary as indicated in Article II.15.4, or is generated by pre-financing referred to in the previous subparagraph, the Commission shall recover it in accordance with Article II.18.

Interest yielded by pre-financing paid to Member States is not due to the Commission.

II.16.5. The beneficiary shall have two months from the date of notification by the Commission of the final amount of the grant determining the amount of the payment of the balance or the recovery order pursuant to Article II.17, or failing that, of the date on which the payment of the balance was received, to request information in writing on the determination of the final grant, giving reasons for any disagreement. After this time such requests will no longer be considered. The Commission undertakes to reply in writing within two months following the date on which the request for information is received, giving reasons for its reply.

This procedure is without prejudice to the beneficiary's right to appeal against the Commission's decision pursuant to Article I.8. Under the terms of Union law in this matter, such appeals must be lodged within two months following the notification of the decision to the applicant or, failing that, following the date on which the applicant learned of the decision.

Article II.17 Determining the Final Grant

II.17.1. Without prejudice to information obtained subsequently pursuant to Article II.19, the Commission shall adopt the amount of the final payment to be granted to the beneficiary on the basis of the documents referred to in Article II.15.4 which it has approved.

II.17.2. The total amount paid to the beneficiary by the Commission may not in any circumstances exceed the maximum amount of the grant laid down in Article I.3.3, even if the total actual eligible costs exceed the estimated total eligible costs specified in Article I.3.2.

II.17.3. If the actual eligible costs when the action ends are lower than the estimated total eligible costs, the Commission's contribution shall be limited to the amount obtained by applying the Union grant percentage specified in Article I.3.3 to the actual eligible costs approved by the Commission.

II.17.4. The beneficiary hereby agrees that the grant shall be limited to the amount necessary to balance the action's receipts and expenditure and that it may not in any circumstances produce a profit for him.

Profit shall mean any surplus of total actual receipts attributable to the action over the total actual costs of the action. The actual receipts to be taken into account shall be those which have been established, generated or confirmed on the date on which the request for payment of the balance is drawn up by the beneficiary for financing other than the Union grant, to which shall be added the amount of the grant determined by applying the principles laid down in paragraphs 2 and 3 of this article. For the purposes of this article, only actual costs falling within the categories set out in the estimated budget referred to in Article I.3.1 and contained in Annex II shall be taken into account; non-eligible costs shall always be covered by non-Union resources.

Any surplus determined in this way shall result in a corresponding reduction in the amount of the grant.

II.17.5. Without prejudice to the right to terminate the agreement under Article II.11, and without prejudice to the right of the Commission to apply the penalties referred to in Article II.12, if the action is not implemented or is implemented poorly, partially or late, the Commission may reduce the grant initially provided for in line with the actual implementation of the action on the terms laid down in this agreement.

II.17.6. On the basis of the amount of the final payment determined in this way and of the aggregate amount of the payments already made under the terms of the agreement, the Commission shall set the amount of the payment of the balance as being the amount still owing to the beneficiary. Where the aggregate amount of the payments already made exceeds the amount of the final grant, the Commission shall issue a recovery order for the surplus.

Article II.18 Recovery

II.18.1. If any amount is unduly paid to the beneficiary or if recovery is justified under the terms of the agreement, the beneficiary undertakes to repay the Commission the sum in question on whatever terms and by whatever date it may specify.

II.18.2. If the beneficiary fails to pay by the date set by the Commission, the sum due shall bear interest at the rate indicated in Article II.16.3. Interest on late payment shall cover the period between the date set for payment, exclusive, and the date when the Commission receives full payment of the amount owed, inclusive.

Any partial payment shall first be entered against charges and interest on late payment and then against the principal.

II.18.3. If payment has not been made by the due date, sums owed to the Commission may be recovered by offsetting them against any sums owed to the beneficiary, in cases where the beneficiary also has a claim on the Union or the European Atomic Energy Community, after informing him accordingly by registered letter with acknowledgement of receipt or equivalent, or by calling in the financial guarantee provided in accordance with Article II.15.1. In exceptional circumstances, justified by the necessity to safeguard the financial interests of the Union, the Commission may recover by offsetting before the due date of the payment. The beneficiary's prior consent shall not be required.

II.18.4. Bank charges occasioned by the recovery of the sums owed to the Commission shall be borne solely by the beneficiary.

II.18.5. The beneficiary understands that under Article 299 of the Treaty on the functioning of the European Union, the Commission may adopt an enforceable decision formally establishing an amount as receivable from persons other than States. An action may be brought against such decision before the General Court of the European Union.

Article II.19 Checks and Audits

II.19.1. The beneficiary undertakes to provide any detailed information requested by the Commission or by any other outside body authorised by the Commission to check that the action and the provisions of the agreement are being properly implemented.

II.19.2. The beneficiary shall keep at the Commission's disposal all original documents, especially accounting and tax records, or, in exceptional and duly justified cases, certified copies of original documents relating to the agreement for a period of five years from the date of payment of the balance specified in Article I.4.

II.19.3. The beneficiary agrees that the Commission may have an audit of the use made of the grant carried out either directly by its own staff or by any other outside body authorised to do so on its behalf. Such audits may be carried out throughout the period of implementation of the agreement until the balance is paid and for a period of five years from the date of payment of the balance. Where appropriate, the audit findings may lead to recovery decisions by the Commission.

II.19.4. The beneficiary undertakes to allow Commission staff and outside personnel authorised by the Commission the appropriate right of access to sites and premises where the action is carried out and to all the information, including information in electronic format, needed in order to conduct such audits.

II.19.5. By virtue of Council Regulation (Euratom, EC) No 2185/96 and Regulation (EC) No 1073/1999 of the European Parliament and the Council, the European Anti-Fraud Office (OLAF) may also carry out on-the-spot checks and inspections in accordance with the procedures laid down by Union law for the protection of the financial interests of the European Union against fraud and other irregularities. Where appropriate, the inspection findings may lead to recovery decisions by the Commission.

II.19.6. The Court of Auditors shall have the same rights as the Commission, notably right of access, as regards checks and audits.

Signatures

1. For the Beneficiary,
Ms Georgette MULHEIR
CEO
LUMOS FOUNDATION LBG

2. For the Commission,
Olivier ROULAND
Head of Unit
DG Employment, Social Affairs and Inclusion

Not usable

20.03.14.

Done at (place) Done at Brussels
..... (date) (date)

In duplicate, in English.

ANNEX I **Description of the action**

See attached document(s): 26 pages..



VP/2010/007 Call for proposals for social experimentations

APPLICATION FORM 2010

DESCRIPTION OF THE ACTION AND TIMETABLE

PROJECT DESCRIPTION

1. Title: *Turning Words into Action: Enabling the Rights and Inclusion of Children with Intellectual Disabilities in Europe*

2. Name of the organisation responsible for implementing the project: Lumos Foundation

3. Description of the project

3.1 Background and Rationale

Better Health, Better Lives Initiative

Recognising that children with intellectual disabilities¹ continue to be one of the most marginalised and socially excluded groups across Europe, the World Health Organization (WHO) Europe launched an initiative in 2008 called Better Health, Better Lives: children and young people with intellectual disabilities and their families. The aim of this initiative is:

...to ensure that all children and young people with intellectual disabilities are fully participating members of society, integrated in the community, receiving appropriate care and support, proportional to their needs.

A key output of the Better Health Better Lives Initiative is a *Declaration on Children and Young People with Intellectual Disabilities and their Families*, which explicitly outlines 10 key Priorities for countries dedicated to ensuring the rights of children and young people with intellectual disabilities. Importantly, the drafting group for the Declaration included individuals with intellectual impairments who worked alongside experts in related fields and family members of individuals with intellectual disabilities. In addition, the Declaration has undergone extensive consultation with representatives of leading NGOs, service providers, Disabled Person Organisations (DPOs) and representatives of

¹ This proposal and the Words into Action project in its entirety will aim to respect terminology consistent with a social model of disability. 'Impairment' will be used to refer to any innate loss of functioning whereas 'disability' is considered a result of environmental barriers and attitudinal discrimination which prevents the full and meaningful inclusion of a person with impairment in all aspects of daily and community life.

For the sake of consistency, this project will adopt the following definitions used by WHO Europe in the Better Health, Better Lives Declaration:

Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity.

Intellectual disability includes a significantly reduced ability to understand new or complex information and to learn and apply new skills (impaired intelligence) *with* a reduced ability to cope independently (impaired social functioning) *which* started before adulthood, and has a lasting effect on development.

The use of the term 'intellectual disability' in both the Better Health Better Lives Declaration and the proposed project, includes children with autism who have intellectual impairments. The term also encompasses children who have been institutionalised because of a perceived disability or family rejection and who acquire developmental delays and psychological problems as a result of their institutionalisation.

Ministries from Member States of WHO Europe. The Declaration has received wide-spread support and will be open for signature by European Governments in November 2010.

Lumos, the lead applicant, has been an active supporter of the Better Health Better Lives initiative to date. We have participated in the drafting of the Declaration and assisted the production of a set of accompanying expert papers. In December 2009, Lumos hosted a consultation session for representatives of leading European non-governmental organisations to offer feedback on the draft Declaration. While the draft Declaration received strong support, NGO representatives felt strongly that the strength of the initiative would be measured not by the Declaration itself but by follow up action towards its implementation. A commitment was expressed between WHO Europe and NGO delegates to a partnership in supporting governments to realise the Declaration's 10 priorities. The proposed project has grown, in part, out of this commitment.

The proposed project, *Turning Words into Action: Enabling the Rights and Inclusion of Children with Intellectual Disabilities in Europe* aims to capitalise on the success of the Better Health, Better Lives initiative and expand its objectives by ensuring the Declaration's laudable priorities are followed through to sustainable implementation. The project aims both to endorse and strengthen the Declaration, by demonstrating how it can be used proactively to improve governmental and societal approaches and responses to caring for children with intellectual disabilities.

Excerpts from the Draft WHO Better Health, Better Lives Declaration

Purpose

On the basis of these conventions and commitments, we state unequivocally that children and young people with intellectual disabilities are equal citizens. They have the same rights to health and social care, education, vocational training, protection and support as other children and young people. They should have equal opportunities to live stimulating and fulfilling lives in the community with their families, alongside their peers. Our purpose, therefore, is to achieve the optimal quality of life for these children and their families by:

promoting and supporting good physical and mental health and well-being;

eliminating health and other inequalities and preventing other forms of discrimination, neglect and abuse;

providing support that prevents family separation and allow parents to care for and protect children and young people with intellectual disabilities;

supporting children and young people in the development of their potential and the successful transitions through life.

Priorities for action

We have identified the following ten priority areas which need to be addressed as a matter of urgency, in order to realize our vision that children and young people with intellectual disabilities and their families are able to live healthy and full lives. We will:

1. Protect children and young people with intellectual disabilities from harm and abuse.
 2. Enable children and young people to grow up in a family environment.
 3. Transfer care from institutions to the community
 4. Identify the needs of each child and young person.
 5. Ensure that good quality mental and physical health care is coordinated and sustained.
 6. Safeguard the health and well-being of family carers.
 7. Empower children and young people with intellectual disabilities to contribute to decision-making about their lives.
 8. Build workforce capacity and commitment.
 9. Collect essential information about needs and services and assure service quality.
 10. Invest to provide equal opportunities and achieve the best outcomes.
-

International Legislation

International legislation, declarations and Conventions secure the rights of all individuals. By definition these universal rights apply to everyone, yet children with intellectual impairments across Europe still face unequal access to these rights in reality.

The Better Health Better Lives Declaration, as well as the proposed project, are grounded in human rights conventions and legislation, including the UN Convention on the Rights of the Child (UNCRC), the UN Convention on the Rights of Persons with Disabilities (UNCRPD) and the European Convention on Human Rights. These three major international Conventions govern these rights but each has its limitations:

1. ***The UN Convention on the Rights of the Child (UNCRC)***. Article 23 is the only article which specifically mentions disability. This article prioritises the child's development of independence and their access to health, education and other services but does not mention the child's right to family life. Indeed, Article 20 allows, if 'necessary', for "placement in suitable institutions for the care of children." Unfortunately, together, these articles have been interpreted in some countries as a justification for institutionalisation: since there are inadequate community based specialised health and education services, institutionalisation in residential special schools or special hospitals is seen as a necessary way of ensuring children's right to access those services.
2. ***The UN Convention on the Rights of Persons with Disabilities (UNCRPD)***. The majority of the Convention sets up a framework to ensure the fullest possible independence and integration in the community of persons with a disability. However the specific article on children (Article 6) does not emphasise their right (and need) to be raised in a family environment. As with the UNCRC, the concept of 'best interests of the child' is open to interpretation. Article 23, respect for home and the family, refers to a child's right to family life and the need to support parents in order to "prevent concealment, abandonment, neglect and segregation". However, it is not explicit in terms of preventing arbitrary separation used ostensibly to provide children health and education services, which is often a primary reason for institutionalisation of these children in Central and Eastern Europe.
3. ***The European Convention on Human Rights***. Article 8 stipulates the right for protection of private and family life and that no public authority should intervene in that unless strictly necessary. The jurisprudence developed around Article 8 states that any State intervention must be both *necessary* and *proportionate*. However, this Convention has no specific references to children, for whom interference in private and family life has a different perspective from that of adults.

These conventions arguably hold greater sway than the WHO Europe Declaration, as ratification is a legally binding commitment. However, the strength of the Better Health Better Lives Declaration lies in its ability to begin to fill a gap in previous international legislation for children with intellectual disabilities, or rather to be more explicit about their rights. The Better Health Better Lives Declaration refers to the need and right for children with intellectual disabilities to live with and be cared for by their families (Priority 2) and the rights of those families to specific support in order to enable children to remain in their home (Priority 6). Priority 3 is clear about the need for deinstitutionalisation and the transformation of care systems that rely heavily on institutional care, replacing these institutions with community based services that support children in their families. The Declaration also outlines clear commitments to investing in (Priority 10) and developing (Priority 5) community services, as well as the need for increased capacity in the workforce (Priority 8) of these services to ensure they are tailored to each child's individualised needs (Priority 4).

Furthermore, legislation and efforts aimed at including persons with disabilities in all aspects of community living often fail to address the specific conditions and challenges of fulfilling these rights for people with *intellectual* impairments. In addition, when including the voices of children or disabled people in consultation on issues that affect them (Priority 7), there is a tendency to exclude children with *intellectual* impairments, often due to the challenges related to their communication needs or underestimating their ability to contribute meaningfully to such a consultation. Children and young people with intellectual impairments then become one of the most marginalised groups amongst the already marginalised, and significantly, fall between the cracks.

Although it is difficult to collect accurate data, it would appear that approximately 50% of children living in large institutions in Central and Eastern Europe are there primarily due to their disability, the majority of whom have an intellectual impairment. Research evidence and practice demonstrate the harm caused to children by institutionalisation. Without the opportunity to form a healthy attachment, children born with impairments struggle to develop to their full potential. A lack of attachment has been proven to result in impaired early brain development, as has insufficient stimulation and interaction in the early years, both of which can then lead to intellectual impairment. Institutionalisation can therefore be both the cause and result of intellectual impairment.

In many countries, such as Bulgaria, children living in residential special schools are not counted in the national data on institutionalised children. They are not seen as institutionalised, but rather as receiving an educational service. Nevertheless, the negative impact of institutionalisation on their health and development remains.

3.2 Aim

To improve the life chances, inclusion, access to rights and social participation of children with an intellectual disability in Europe. To ensure that all children and young people with intellectual disabilities become fully participating and included members of their communities with genuinely equal opportunities to their peers and support proportional to their needs.

3.3 Objectives

1. To provide opportunities for the genuine inclusion of the voices of children and young people with intellectual impairments and their families and carers. To demonstrate implementation of inclusive policies by providing a model of good practice in consultative participation and what is both possible and apposite for children with intellectual impairments.
2. Using the Better Health, Better Lives Declaration as a framework, assist countries to develop, and understand how to implement, national plans for deinstitutionalisation through the development of community based health, education and social service alternatives. To ensure countries consider and are able to accommodate the specific challenges of meaningfully including children with intellectual disabilities.
3. To increase mutually beneficial partnerships and learning including transnational cooperation and in-country collaboration of stakeholders.
4. To strengthen the understanding, interpretation and implementation of international legislative and rights based frameworks in meeting the needs of children with intellectual disabilities and their families. For target countries to understand the harmful effects of institutionalisation and agree values and principles of inclusive living, including the right of all children to live with their families.

3.4 Project Countries

Serbia, the Czech Republic and Bulgaria are the three target countries of this project. All three of these countries have demonstrated commitment to the social protection and inclusion of their most vulnerable citizens through being signatories to international human rights legislation.

	Bulgaria	Czech Republic	Serbia
UN Convention on the Rights of the Child	Signed 21.05.1990 Ratified 03.08.1991	Signed 30.09.1990 Ratified 22.02.1993	Signed 26.01.90 (as former Yugoslavia) Ratified 12.03.2001
UN Convention on the Rights of Persons with Disabilities	Signed 27.09.2007	Signed 30.03.07 Ratified 25.09.09	Signed 17.12.07 Ratified 31.07.09
European Convention on Human Rights		Signed 4.11.2000	Signed 03.04.2003 Ratified 03.03.2004

In addition, each of these countries has shown initial support for the Better Health Better Lives Declaration through attendance at a high level meeting, held in Belgrade in March 2010. This meeting served as a consultation session on the draft Declaration for representatives of WHO Europe Member States. The current draft of the Declaration, which will be open for signature at a conference in November 2010, was agreed at this consultation session in Belgrade by those in attendance.

However, each of these three countries also has significant gaps in local legislation and practice in social protection for children with intellectual impairments. While this can be said of almost any country, including those considered relatively 'developed', these three project countries were chosen, in part, due to their persistent reliance on residential systems of care for vulnerable children and underdeveloped inclusive systems of health, education and social services (such as foster care).

According to the UNICEF 2008 TransMONEE report² there are 21,560 children living in full-time residential care in the Czech Republic. Of these, 13,145 are classified as having a disability. In Serbia in 2008, 1,143 children with disabilities lived in residential institutions³. In Bulgaria, the latest figures available in the 2010 Action Plan for Deinstitutionalisation indicate there are 7,150 children and young people in residential homes (approximately 2000 with disabilities). They are housed in 132 institutions across the country, 24 of which are homes for children with intellectual impairments.

In addition, each of these countries has a large ethnic Roma population who traditionally fall below the poverty line and comprise a majority of the children living in institutional care. In Bulgaria, 45% of children in care are Roma while in the Czech Republic 24% of babies in care in 2007 were Roma⁴.

The selection of countries was also undertaken with an eye towards social experimentation, sustainability and longer term potential for follow up work. As this process is envisaged as a pilot project, it was important to establish ways in which the methodology could be replicated. No less important however, is the initial energy created by the project in the three pilot countries and an exploration of ways in which to further the project objectives in these countries upon its completion. With established branches in Bulgaria and the Czech Republic, Lumos will be able to ensure sustainability and momentum by providing longer term support after the Words into Action project. With local programmes and teams in place, Lumos will explore the need for supplementary projects or funding as the Words into Action project comes to an end. Lumos has also begun initial enquires and research into expanding our programmes into Serbia and would be open to exploring any additional support needs of the Serbian National Working Group upon completion of the project.

This project arises out of the common objectives of the Open Method of Coordination (OMC) and the 10 priorities outlined in the WHO Europe Better Health, Better Lives Declaration. Project activities seek to harmonise coordination of policies in social protection and social inclusion both within a given country, and at the European Level. National and transnational action will first seek to identify each country's individual starting point through an exploration of existing legislation, gaps and areas of good practice. The following provides a very brief outline of priority areas for each of the three target countries.

Bulgaria

Bulgaria's National Strategic Report⁵, developed as part of the OMC and based on agreed common objectives and indicators, demonstrates a clear commitment to the social protection and social inclusion of children in general, and children with disabilities specifically. The National Strategic Report clearly identifies the most vulnerable groups in Bulgaria today given current trends in economic and social development. These groups include children, families with single parents or families with many children, Roma, people with disabilities and women. These marginalised groups are the same as those which compose the vast majority of children and families affected by an

² As reported in: Eurochild Children in alternative care: National Surveys of Children. 2nd Edition, January 2010.

³ In print, Children and Young People with Intellectual Disabilities in Europe: The Case for Change. Background Paper to the Better Health Better Lives Declaration, Bucharest, Romania, November 2010.

⁴ Eurochild Children in alternative care: National Surveys of Children. 2nd Edition, January 2010.

⁵ Republic of Bulgaria, National Report on Strategies for Social Protection and Social Inclusion 2008-2010. Approved by the Council of Ministers of the Republic of Bulgaria on September 25th, 2008.

institutionalised residential system of care in many Central and Eastern European countries, including Bulgaria.

Bulgaria's National Action Plan for Social Inclusion 2008-2010 sets out a series of policy objectives, many of which this project aims to address. Policy Objective 1 (pp. 25) focuses on limiting the intergenerational transmission of child poverty and social exclusion. Research demonstrates clear links between poverty and disability as well as both poverty and disability with social exclusion in residential care. In addition, children who were raised in an institutional system of care are more likely have their own children taken into residential care as adults⁶. The proposed project will therefore aim to have impact on those most at risk of harm, as identified in Bulgaria's national strategic report. Priorities identified in this report include current and active reform efforts in both the health and education sectors as well as "acceleration of the process of deinstitutionalisation and extension of the scope of the system for community based social services" (pp. 9). In addition, current national policies, as summarised in the strategic report, identify strong commitments to the policy priorities of equal opportunities for all, gender mainstreaming and prevention of discrimination. The proposed project will echo these priorities throughout its activities. Bulgaria's adopted Strategy for Ensuring Equal Opportunities for People with Disabilities 2008-2015 echoes many of these priorities and demonstrates a longer term vision to the full social inclusion of children with disabilities beyond 2010.

The Government of Bulgaria has also adopted the strategic document 'National Strategy: Vision for deinstitutionalisation of the Children in Bulgaria' (adopted with minutes 8.2 of the Council of Ministers dated 24.02.2010). This document outlines political commitment to reforming the system of care for children and their families in Bulgaria and to bringing a permanent end to institutional care for children and young people. The Government has developed an action plan to accompany its DI policy, which is currently awaiting adoption by the Council of Ministers. This comprehensive plan outlines a series of steps over a 10 year period, ultimately resulting in the complete closure of all 132 institutions for children and young people across the country through the development of community based alternatives. Recognising research and practice which demonstrates that, whilst all children in institutions are at risk of harm, young children with disabilities are those at the most severe risk, the Government of Bulgaria has laudably prioritised these children in the planning and implementation of their DI plan. The first stage of reform, called the 'Childhood for All Project', began in 2010 and focuses on planning the closure of all 25 institutions for children with disabilities in the country and also considers children with disabilities over age three who remain in homes for children birth to three as alternative placements are not available.

Czech Republic

The Czech Republic has also developed a national strategic report entitled 'The National Strategy Report for Social Protection and Social Inclusion 2008-2010'. While this report outlines commitments to the OMC common objectives and lists children and persons with disabilities as vulnerable groups, it nonetheless suggests a weak commitment to disability mainstreaming in all policy priorities. However, the Czech Republic has demonstrated its commitment to social protection through the adoption of a national policy on deinstitutionalisation.

This project aims to build on this National Strategy and other national policies to aid the Czech Republic in both recognising and addressing the unique needs of children with intellectual disabilities in their society.

Serbia

As a potential candidate country, social inclusion is an explicit component of Serbia's ascension agenda. Serbia has made laudable public declarations to improve the quality of life for all of its most vulnerable social groups, but will need support to do so. The Serbian Government has made strides towards developing social protection policies and have approved a Social Welfare Development Strategy (2005) and a Strategy for Improving the Position of Persons with Disabilities (2007-2015).

⁶ Eurochild, Children in alternative care: National Surveys of Children. 2nd Edition, January 2010. Executive Summary: National Surveys of Children in Alternative Care.
http://www.eurochild.org/fileadmin/user_upload/Publications/Eurochild_Reports/FINAL_EXEC_SUMMARY.pdf.

Serbia has also made efforts towards deinstitutionalisation and the development of foster care and social services for families. A National Agency for Fostering promotes their primary aim of placing children with disabilities in foster families. As a result, the number of children with disabilities living with foster families has significantly increased, while those living in institutions has consequently decreased.⁷

These developments are however still nascent and much work remains to be done. The transnational learning and intensive mentoring from the Steering Committee envisaged in this project will support Serbia to develop a strategic framework and update existing policies to ensure that deinstitutionalisation (through the development of community based services), social protection and social inclusion are all central focuses of any newly developed strategy and that these plans specifically consider the needs of children with intellectual disabilities and their families.

3.5 Project Activities

This project proposes two primary courses of action, which would run concurrently. The first focuses efforts at the National level and aims to result in the production of an action plan for the inclusion of children with intellectual impairments in each country's current health and social reform policy areas. These plans will build on the success and endorsement of the Better Health, Better Lives Declaration at the European Level by ensuring national level consideration and planning in line with specific country circumstances and priorities. The second focus of the proposed project seeks to lead by example and ensure that children and young people with intellectual impairments are actively and meaningfully included in planning regarding decisions which affect their lives. Recognising the need for clear stakeholder collaboration and communication across different levels of action, representatives from these groups will come together regularly throughout the project to share experiences and plan for future developments. Social experimentation will further enhance both of these project strands and is described in more detail in section 3.6.

3.5.1 National and Transnational Action

National level support is essential to ensuring the Better Health Better Lives Declaration is translated from international 'words' into national 'action'. Bulgaria, the Czech Republic and Serbia have all made commitments to the social protection, poverty reduction and full inclusion of those most marginalised in their countries. However, the degree to which plans specifically address children and young people with intellectual impairments varies across countries, as does the degree of implementation of these plans to date. Bulgaria and the Czech Republic are relatively new Member States while Serbia is a candidate country. As such, all of the project countries have little capacity or experience in incorporating international Conventions into national legislation and practice. The National and Transnational Action strand of the proposed project will support the aim of the social OMC "to improve coordination, cooperation and agreement of the necessary principles and actions between all stakeholders involved in the development, implementation and monitoring of social policies."

National action will be supported and implemented by a 'National Working Group' in each country. Working groups will focus on multi-level stakeholder cooperation in the development and initial implementation of an action plan specific to children with intellectual disabilities. These action plans will seek to build on current national policy and priorities for the social protection and social inclusion of children, and extend the thinking to specifically consider how to ensure these same rights are secured for children with intellectual disabilities. Each working group will be empowered to identify their country's specific priorities, gaps and burgeoning good practices upon which to build, using the Better Health Better Lives Declaration priorities as a framework and ensuring consistency with national OMC priorities. In this way, each country's National Working Group may choose to focus their action plan on slightly different aspects of social inclusion and community living. It is important, given the pilot nature of the project and relatively short timetable, that action plans balance ambition and the drive for change with realistic and attainable goals. Reforming an entire system of care for children with individuals can seem understandably overwhelming when faced with a long

⁷ In print, Children and Young People with Intellectual Disabilities in Europe: The Case for Change. Background Paper to the Better Health Better Lives Declaration, Bucharest, Romania, November 2010.

tradition of residential care for vulnerable children and the segregation of individuals with disabilities. Often, the most difficult aspect of this large scale reform is making a start. This project seeks to aid countries who have demonstrated the resolve to reform during these initial stages by offering technical assistance and capacity building through collaborative transnational exchanges.

Multi-stakeholder working groups for each country will be identified at the beginning of the project. These National Working Groups will facilitate the national planning process for the duration of the project. Working groups will include a maximum of 10 participants and will likely comprise a reasonable combination of the following, taking into consideration local conditions and circumstances:

- The Local Project Coordinator
- 3-4 Government representatives from the Ministry of Health, Ministry of Social Services, Ministry of Education, the Ministry of Finance, local authorities or any other government body relevant to deinstitutionalisation, the protection of child rights and/or implementation of services
- 2-3 children or young people with intellectual impairments (to include autism)
- 1-2 family members or carers of children or young people with an intellectual disability
- A self-advocate or representative from a local disability NGO or Disabled Persons Organisation (DPO)
- A service provider: this could include an NGO, Director of an institution, Head of a school, etc. as appropriate
- Other participants as needed and appropriate to local context.

The ultimate composition of these working groups will be consistent with other ongoing efforts in each country that address the OMC and National Strategic Reports. For example, in Bulgaria, an ongoing expert group, with representatives from the national, municipal, regional and institutional levels, was established to assist in the realisation of the social protection priorities outlined in their OMC strategic report. To ensure consistency and synergy across national efforts, a member from this group would therefore be invited to join the Bulgarian working group. In addition, an appropriate gender balance will be respected in each of these National Working Groups.

An 'Expert Mentor' will be identified from the project steering committee to support and facilitate the working group for the duration of the project activities. This is intended to ensure the Steering Committee is able to maintain both the momentum and quality of the project between meetings but also to allow for the demonstration of proper and meaningful inclusion of children with intellectual impairments. The inclusion of children or young people with intellectual impairments on working groups will provide opportunities to model meaningful consultation but will require the support of an international mentor who has experience of this sort of inclusion in policy arenas. The expert mentor will also be able to facilitate additional cross-country learning by providing examples of best practice and lessons learned by experience from countries not represented in the working groups. As it is important for both policy relevance and sustainability that each working group identifies their own local policy priorities for children with intellectual disabilities, mentors will be delegated from within the steering committee only after these priorities have been identified (by month three). Specific expertise can then be matched with country need and where possible, learning across CEE countries supported.

These National Working Groups will come together five times in total over the fifteen months of planned activities, approximately once every three months. Three meetings of each National Working Group will be convened in-country and all three working groups will also come together for two transnational meetings. For a thorough description of these meetings, objectives and specific outcomes, see the attached detailed work programme.

3.5.2 Child Participation

The United Nations' Conventions on the Rights of the Child (UNCRC) and the Rights of Persons with Disabilities (UNCRPD) provide the international legislative framework for the right to full participation in informed choice making about one's own life for children with disabilities. Article 12 of the UNCRC mandates the right of all children to participate in decisions which affect their lives. The UNCRPD preamble recognises "the importance for persons with disabilities of their individual autonomy and independence, including the freedom to make their own choices..." while Article 3 lays

out one of the general principles of the Convention as “respect for inherent dignity, individual autonomy including the freedom to make one’s own choices, and independence of persons”. However, far too often well meaning adults, including policy makers, service providers, parents and caregivers, make decisions on behalf of children with intellectual disabilities without consulting them about those decisions, which have a direct impact on their lives. In addition, parents’ priorities and wishes for their children are not always the same as the child’s priorities and wishes. While most children are able to express these feelings to their parents, they have to be actively sought and facilitated for children with intellectual and communication impairments.

True and meaningful consultation with children in general remains rare and for children with disabilities, it is exceptional. When efforts are made to include children with disabilities in decision making processes, they are almost always directed at children with physical or sensory impairments as it is felt that they are easier to include given communication and behaviour challenges associated with intellectual impairments. While these children are currently given little control over their own lives and decisions, even the most severely impaired are capable of doing so with the correct and necessary supports. Children with intellectual impairments and complex disorders such as autism, Down Syndrome or Cerebral Palsy are all but denied their right to participation as outlined in priority 7 of the Better Health Better Lives Declaration. Even in countries where disabled children are consulted with some frequency on decisions regarding their own lives and needs, involvement at higher strategic levels of planning and policy remains rare. This exclusion runs particularly true for those marginalised even further through social exclusion and institutionalisation. The active and meaningful participation of children with intellectual impairments and complex disabilities are a key aim of this project.

Ongoing child participation activities will operate in each country concurrently with national planning processes. Each country’s local Project Coordinator will play a key role in the organisation and facilitation of these activities, with the primary aim of ensuring the active and meaningful engagement of children with intellectual disabilities in all stages of this project. It is anticipated that the Local Coordinator will begin working with partner organisations as early as month three to identify a group of local children and young people with intellectual disabilities to work together throughout the duration of the project. Groups will comprise, as far as possible, children with intellectual impairments currently residing in institutions or special schools, alongside those currently living with their families or in foster care. This group will come together a minimum of one time per month but as often as individual child circumstances allow. Local partners to this project, Karin Dom in Bulgaria and Pardubice Council in the Czech Republic, have both agreed to help facilitate the identification of a group of children in their local communities and to provide, whenever possible, time and resources to these activities. In Serbia, a member of Better Health, Better Lives Drafting and Steering Committee is a senior academic and practitioner in the field of children with intellectual disabilities is assisting us to identify a Serbian organisation with whom to collaborate on child participation activities. European wide networks of project partners and the WHO will be additionally drawn upon if necessary.

Children living in institutions are rarely given the opportunity to engage with other children in organised play activities and almost never allowed to make decisions which affect their own lives. Even routine decisions such as what clothes to wear, what food to eat or when and how often to use the toilet, are decided for children living in institutions. The rigidity of a fixed schedule for life in an institution, as well as low staff to child ratios, often given institution personnel little agency over their interactions with children. Furthermore, communication challenges, developmental delays, learning difficulties and challenging behaviours may all lead institution staff to believe, often because they have never seen or been taught otherwise, that children with intellectual disabilities are incapable of making these decisions in the first place.

Given this background, the project’s child participation activities will necessarily begin with preparation work for children living in residential institutions. Individual sessions may be necessary for some, who will then quickly be able to come together with other children from the institution. Initial preparatory sessions will use games to teach choice making, communication and the encouragement of the children’s overall involvement and participation. These groups of children will be empowered, through a series of play based session and activities, to begin expressing their wishes, needs and opinions, possibly for the first time. As the group becomes comfortable with these new experiences, the Local Coordinator will progress the group activities to those which facilitate

community interaction. Initially children with intellectual disabilities living with their families or in foster care will join the existing group. Later, activities will be arranged to bring together children with intellectual impairments with their siblings and peers. Group activities may be as simple as a trip to the local park; what is important is that they serve to demonstrate the inclusion of children with intellectual disabilities in day-to-day activities to all the children involved, as well as to the larger community. As the project progresses, the group will begin to participate in facilitated activities whereby they are able to comment on the Better Health, Better Lives Declaration and talk about what it means for them and their lives. These activities will use the EasyRead version of the Better Health, Better Lives Declaration which Lumos has already produced in order to ensure its widespread accessibility. They will be empowered to communicate their thoughts on what is needed in their country to ensure the Declaration can be implemented and thereby begin to contribute to the national action, which will be happening concurrently. The group will elect two of its members as representatives to feed back to the larger national working group and if possible, the national and transnational meetings.

The child participation activities in each country will culminate with a 'child-choice event'. Children will be given a budget, support and resources to design, plan and carry out a fun event which is highly visible to the general public and which serves to demonstrate their inclusion in community life and to highlight the Declaration's priorities. Decision making regarding the activity and use of the budget will be facilitated by the Local Coordinator as part of the child participation working group sessions throughout the project. This child-choice event will be widely publicised through the national working group, local partner organisations and, where possible, local media. The event will also serve as an opportunity to disseminate advocacy publications which aim to combat discriminatory attitudes and facilitate the social inclusion of children with intellectual impairments. Information on all child choice events will also be publicised at the European Level by Inclusion Europe, WHO Europe and Lumos in order to increase cross-country learning and advocacy.

Despite the scope of these child participation activities, the corresponding budget line is quite small. The project aims to demonstrate that the participation and meaningful inclusion of children with intellectual disabilities does not need to be a resource intensive or expensive exercise. The majority of the allocated budget will be used to provide the supports necessary to ensure activities are adapted to the individual skills and needs of each child. For example, one child may require wheelchair accessible transportation while another may benefit from pictures or visual aids to support communication. The child participation activities envisaged for this project then provide excellent value for money.

3.6 Social Experimentation

The proposed project also seeks to promote social experimentation in social protection and social inclusion. In order to do so, the objectives of this proposal have been further defined into measureable outcomes, which will demonstrate effects of the activities over the project's duration and allow for the comparison of experimental and control groups.

Objective 2: Using the Better Health, Better Lives Declaration as a framework, assist countries to develop, and understand how to implement, national plans for deinstitutionalisation through the development of community based health, education and social service alternatives. To ensure countries consider and are able to accommodate the specific challenges of meaningfully including children with intellectual disabilities.

One of the primary outputs of this project, described below, is the development of a simple and user friendly self monitoring and evaluation tool on the degree to which full inclusion for children with intellectual disabilities has been obtained in policy and practice. This tool will provide a set of easily interpreted indicators for each of the 10 Priorities in the Better Health, Better Lives Declaration. Progress towards social protection and social inclusion of children with intellectual disabilities in national policy and programmes over the duration of the proposed project will be measured in each of the project countries using this self-evaluation tool prior to, and upon completion of, project activities. By using this same self-evaluation tool to evaluate the baseline progress of control countries not participating in project activities, this tool will further serve as a method of social experimentation. Given the pilot nature of this experimentation, up to three additional European nations will complete this tool. Countries with similar geographic, socio-cultural and economic profiles to the project countries will be identified at the beginning of the project. While this exercise will ensure social experimentation through comparison of experimental and control countries, pre and post testing of

project countries further increases the utility of this social experimentation as “the social value of an experiment depends not only on the inherent importance and validity of the information it provides, but also on whether it is used to improve policy”.⁸

Objective 1: To provide opportunities for the genuine inclusion of the voices of children and young people with intellectual impairments and their families and carers. To demonstrate implementation of inclusive policies by providing a model of good practice in consultative participation and what is both possible and apposite for children with intellectual impairments.

A Knowledge, Attitudes and Practice (KAP) survey will be undertaken to assess the degree to which this project is able to meet the above objective. KAP studies allow insight into what people know and how they feel and behave around a given topic. This analysis, before and after project activities, will allow for an assessment of the changes this project results in for these three dimensions of human experience with regards to children with intellectual disabilities. This will then allow future social experimentation and project replication which is best suited to meet its aims.

A simple survey will be completed with members of the National Working Groups, family members of children in child participation groups and personnel working in institutions where children live. This survey will be completed both prior to, and upon completion of, the proposed project. This survey will assess participants' knowledge and attitudes surrounding, and behaviours towards, intellectual disability. A modified tool will also be used with the children themselves in order to allow for self-evaluation of any development this project facilitates.

Components of the KAP survey will be incorporated into the above mentioned social experimentation with control countries. By asking policy makers completing the self-evaluation tool additional questions on their KAP surrounding intellectual disability, it will be possible to analyse the impact of national and transnational project activities. Policy maker's responses to the KAP survey from project countries will be compared with those of policy makers in control countries. The completion of the KAP survey by family members and institution personnel not involved in the project's child participation activities will provide a control group sample for these stakeholder groups.

3.7 Actors in Project Activities

3.7.1 Project Partners

Karin Dom is a day Centre for Rehabilitation and Social Integration of Children with Special Needs and their Families in Varna, Bulgaria. Amongst others, the centre provides services to children with intellectual impairment, learning difficulties, autism and multiple or complex disabilities. Karin Dom combines educational and therapeutic work with children with advocacy and raising public awareness to help social inclusion as part of a better quality of life.

Pardubice Region represents a local authority currently undergoing reform of their residential system of care for children with disabilities through the development of community based health, education and social service alternatives. Pardubice County demonstrated early commitments to national reform efforts and has recently been named as an official pilot county for the national action plan on deinstitutionalisation in the Czech Republic”.

3.7.2 Supporting Organisations

The following organisations, while not official partners in the proposal, have both expressed their commitment to supporting this project. Both organisations will help to ensure that, despite its pilot nature, the proposed project is nonetheless high impact through wide publicity of project activities and broad dissemination of project outputs across Europe.

World Health Organisation (WHO) Europe has expressed a strong commitment to working in partnership with NGOs and service providers throughout their Better Health Better Lives initiative.

⁸ http://www.evidencebasedpolicy.org/docs/Orr-Basic_Concepts_of_Social_Experiments.pdf, pp.2.

WHO Europe has agreed to sit on the Steering Committee member of the proposed project which will continue this mutual learning partnership and ensure synergy across the two projects.

Inclusion Europe is a 'European Association of Societies of Persons with Intellectual Disabilities and their Families' with a longstanding history of campaigning for the rights and interests of people with intellectual disabilities and their families throughout Europe. Inclusion Europe's support will ensure the widest possible dissemination of the projects key outputs to people with intellectual disabilities and their families across Europe.

3.7.3 Project Management

A multi-layered system of management includes the following bodies:

Steering Committee

This Steering Committee will be officially formed in month one of the proposed project. However, a majority of projected members have been working together closely on the Better Health Better Lives initiative and in designing the proposed project. The Steering Committee will be comprised of senior representatives from official project partners and 'partners' in action as well as young people with intellectual impairments and family members.

The main tasks of the steering committee are as follows:

1. Oversee all project activities; provide expert advice and technical assistance
2. Oversee the national action activities as a whole; three members to provide more consistent mentoring for the duration of the project, one for each project country.
3. With additional external experts if needed, facilitate transnational workshops.
4. Oversee and support child participation activities.
5. Monitor ongoing process and provide internal evaluation at all stages of the project to include contributing to a final evaluation report.
6. Flexibly respond to the success or challenges of project implementation and adapt plans as needed.
7. Responsibility for overseeing use of finances and adhering to projected budget.

This committee will comprise up to 10 members from the following:

1. **Regional Adviser for Mental Health, WHO Europe** and responsible for the Better Health, Better Lives Initiative and Declaration. **Dr. [Name]** has articulated and demonstrated his commitment to working in partnership with NGO's to ensure the Declaration is both relevant to their activities and followed through to implementation. His participation on the Steering Committee strengthens this commitment and will ensure consistency with the Better Health Better Lives initiative as well as widespread European dissemination of Words into Action.
2. **Professor [Name]** is the Chair of the Better Health, Better Lives Drafting and Steering Committees. She is the mother of two adult disabled children and has first hand family experience of intellectual disability. She is a professor of Psychiatry of Learning Disability in the Division of Mental Health at St. George's, University of London. She is a former President of the Royal College of Psychiatrists (2005) and current Vice President of the Institute of Psychiatry and Disability. **Dr. [Name]** is also the editor of the 'Books Beyond Words' series of picture books for people with intellectual disabilities.
3. **Dr. [Name]** is the Director of the Centre for Inclusive Futures and advocate for his profoundly disabled sister, **[Name]**, who spent much of her life in British institutional care. **Dr. [Name]** was consultant to WHO Europe on the development of the Better Health, Better Lives Initiative; is volunteer adviser to Inclusion International and has contributed to initiatives on health and social care development in the Czech Republic, Romania and Slovakia.
4. **[Name]** Executive Director of Karin Dom Foundation in Bulgaria, partner to the proposed project representing an inclusive service provider for children with intellectual disabilities in Bulgaria
5. **[Name]**, President of Pardubice Region in the Czech Republic, an official project partner representing a local authority.

6. [redacted], Programme Development Coordinator, Lumos. [redacted] has been actively involved in the Better Health, Better Lives Initiative and had been project managing Lumos' support, including coordinating external NGO efforts, to the realisation of this initiative.
7. A minimum of two young people with intellectual disabilities. It is anticipated that at least one of these young people will have spent a significant portion of their childhood living in an institution from one of the project countries. To respect the gender balance of representatives with intellectual impairments and the steering committee as a whole, at least one of these participants will be a woman.
8. A self-advocate with the lived experience of disability and in articulating disability issues and involvement in previous reform.

In addition, the Project Manager (Georgette Mulheir) and the External Evaluator ([redacted]) will attend Steering Committee meetings.

Project Management Team (PMT)

This team, supported by the steering committee, will be responsible for the day-to-day implementation of the project's activities.

Post	Filled by	Roles and Responsibilities
Project Manager	Georgette Mulheir Lumos, Director of Operations. Georgette oversees all programme activities at Lumos including those undertaken by the Bulgarian and the Czech Republic branches. Georgette has also been a contributor to the Better Health, Better Lives Initiative as a member of the Declaration drafting group and coordinating the production of expert papers. Please see attached CV for additional details.	Responsible for overall management of the project and for ensuring the quality of work of the PMT. Additional details can be found in the attached Job Specification.
Project Coordinator This will be a half-time post for 16 months of the proposed project	To be recruited if project proposal is successful to begin in month three of the planned activities. The post will run from months 3-18 of the project activities.	Responsible for coordinating all project activities, under the supervision of the Project Manager. The project coordinator will oversee ongoing national action activities in each country by coordinate support and ensuring timely production of outputs. The project coordinator will also oversee Local Coordinators and assist with the design of child participation activities. Additional details can be found in the attached Job Specification.
Finance & Administration Officer This will be a quarter-time post for 16 months of the proposed project	To be recruited if project proposal is successful to begin in month three of the planned activities. The post will run from months 3-18 of the project activities.	Responsible for coordinating all logistics to the project including secretarial support for Steering Committee meetings and transnational workshops. Additionally responsible for the project budget and financial reporting to the European Commission. Additional details can be found in the attached Job Specification.
Local Coordinator This will be a full time post for 12 months of the proposed project	Three Local Coordinators, one per project country, will be recruited if the project proposal is successful. These posts may be filled by local project partners. The post will run from months 4-15 of the project activities.	The Local Coordinator will support national action by sitting on the National Working Group. They will ensure coordination and collaboration of this group and provide logistical support to meetings. They will have the primary responsibility of designing and implementing child participation activities in their country. Additional details can be found in the attached Job Specification.

Additional details about each post can be found in the attached job descriptions.

3.8 Primary Outputs

In summary, the activities described above will include the following outputs:

1. National and Transnational Action: a total of 9 in-country meetings (3 meetings x 3 countries) and 2 transnational meetings will facilitate national planning for children with intellectual disabilities and mutual learning.
2. Child participation: ongoing group events and activities culminating in a highly visible child-choice event.
3. Social Experimentation: an analysis comparing project participants and control groups using the self-evaluation tool (described below) and a KAP study.

In addition, the following written outputs will be produced:

1. Newly developed or updated action plans for children with intellectual disabilities in each of the three countries. These will focus on one or more of the Better Health, Better Lives priorities as identified by working groups but will each be grounded in the principles and best practice of inclusion, community living and deinstitutionalisation.
 - a. An EasyRead version of each these plans will be produced.
2. A guide to national planning which will assist countries in translating the Better Health Better Lives Declaration's words into national action. This guide will offer concrete advice on including children with intellectual disabilities in future government policies and programmes as well as on how to ensure children are able to contribute to the planning process. This will include a brief report from each country's National Working Group on their experiences during the project, sharing their work to date. Efforts will be made to also report on progress towards implementation of the Declaration across Europe more widely. These will highlight areas of good practice and innovative aspects in planning and implementing change for children with intellectual disabilities.
3. A guidance manual on the facilitation and active and meaningful participation of children and young people with intellectual disabilities in contributing to decisions which impact upon their lives. This is a gap in resources currently available as manuals which provide pragmatic suggestions for children with disabilities typically focus on physical or sensory impairments.
 - a. An easy read version of this will also be produced. This will focus on encouraging children with intellectual disabilities to become involved in the planning process and demonstrating how this is possible.
4. A simple and user friendly self monitoring and evaluation tool which provides a set of indicators for each of the 10 priorities in the Better Health, Better Lives Declaration. This tool will be reproduced in all PROGRESS Country languages and widely disseminated.
5. A child publication which demonstrates their thoughts and feedback on the Declaration. This publication could be in the form of pictures, video, drawings, words or anything else children wish to create. By its nature this will also be an EasyRead accessible publication
6. A final project report will be provided to the EC which details its results and highlights successes and areas for growth. This report will contain the results of social experimentation activities, including an analysis of the results gleaned from comparing project and control groups using both the self-evaluation tool and KAP survey. In addition, direct recommendations regarding funding initiatives required to implement the action plans for children with intellectual disabilities developed as part of this project will be provided to DG Employment and DG Regional Development country units for Bulgaria and the Czech Republic and to DG Enlargement.

3.8.1 Dissemination

As this project is envisaged as a small scale pilot endeavour, dissemination of information and results will be essential to any future replication or expansion of the project. Project information will be disseminated in the following ways to ensure maximum exposure

1. A website, which will contain free access pdf versions of each of the above outputs and will also serve as a central point of information for the Better Health Better Lives Initiative. In this way it will begin to 'map' other activities towards implementation of the Declaration across Europe in an effort to continue cross-country and multi-stakeholder collaboration. This website will be hosted as a subsection on Lumos' website, www.lumos.org.uk.

2. Production of the above outputs (with the exception of National Action Plans) in all four project languages- English, Bulgarian, Czech, Serbian and French.
3. Further production of the self-assessment monitoring and evaluation tool (output 4) in all remaining PROGRESS Country languages with wide distribution through supporting organisations WHO Europe and Inclusion Europe.
4. Production of developed action plans for each country and the inclusion guidance manual in EasyRead format to ensure children and young people with intellectual impairments are able to fully access the information gleaned.
5. Printed replication of the above outputs totalling of 5,300 copies- see the budget for a specific breakdown.
6. Production of 3000 data CD's which contain all project outputs in all four project languages and the monitoring and evaluation self-assessment tool in all PROGRESS Country languages.
7. Leaflets, posters and general advocacy materials will be produced in each country (total of 1,500) to support the messages of the child participation activities and advocate for the right and need of full inclusion for children with intellectual disabilities.
8. Publicity of the child-choice events (1 per country), which serves to make the inclusion of children and young people with intellectual disabilities in daily activities highly visible to the larger community.
7. Dissemination of project information and all outputs at a European level through supporting organisations Inclusion Europe and WHO Europe. Project information and outputs will also be shared with the Ad-Hoc Group on deinstitutionalisation, which Lumos chairs. This will ensure wide dissemination across sectors and to organisations committed to the field of social protection.
8. It is also suggested, dependent on the outcomes of the project, that an OMC 'peer review' seminar be considered upon completion of the project to further disseminate information and increase collaborative mutual learning opportunities across Europe. Lumos would be prepared to contribute to this seminar even after the project has officially ended.

All publications will clearly mention that funding has been graciously received from the European Union using the phrase "with support from the European Union". This will also be announced at all National and Transnational meetings and be printed on meeting handouts and used on power-point presentations. All communications, including the website, will clearly indicate that the sole responsibility lies with the beneficiary and that the Commission is not responsible for any use that may be made of the information contained herein.

3.9 Project Evaluation

The proposed project will benefit from having three tiers of evaluation.

Internal Evaluation

1. Regular meetings of the Steering Committee including three in person meetings and three teleconferences⁹ in addition to more routine daily contact.
2. A dedicated Project Coordinator to work from the Lumos London office where they will be in daily contact and overseen by the Project Manager.
3. Regular meetings between the Project Management Team (PMT) including the Project Manager (PM), Project Coordinator (PC) and Finance and Administration Officer (FAO). These meetings will Local Coordinators from the project countries by teleconference as and when needed.
4. The PC will visit each country two times over the project to supervise and advise LCs. Additional monthly meetings (at a minimum) will occur by teleconference.

⁹ Teleconference meetings are planned given the need to balance regular Steering Committee contact with logistical and budgetary constraints. However, we also recognise that teleconferences may reduce the accessibility of these meetings for Steering Group members with a disability. The budget therefore allows for travel costs to ensure these members of the Steering Group can participate in the meeting in person with either the PMT or Local Coordinators present to ensure their informed and active engagement in the meeting.

External Evaluation

An external evaluator is required to ensure that objective and independent feedback to the project is provided throughout. [redacted] has been identified to fulfil this role for the proposed project (please see included CV). [redacted] will enable independent monitoring of the quality of the project and the achievement of activities according to the project timescale. [redacted] is a senior practitioner with significant experience in both policy arenas and in including people with intellectual disabilities in the planning process. For objectivity, [redacted] will not engage directly with national or transnational action and child participation activities but will act as an observer and 'critical friend' to these activities and to the Steering Committee. Evaluation will be an embedded, interactive and organic, developing process throughout the project and the evaluator will therefore attend Steering Committee meetings to observe and make ongoing recommendations.

The External Evaluator will undertake the following tasks:

1. Act as an observer and critical friend at Steering Committee meetings
2. Attend one National Working Group meeting in each country
3. Attend both transnational workshops
4. Provide monthly updates and quarterly reports to the Steering Committee advising them of particular successes and early warning signs of any challenges to come.
5. Provide an end of project independent external evaluation report.

For additional information about evaluation methods as pertains to each project objective, please see the attached detailed work programme.

In addition, an independent audit of the budget and financial reporting will be used if necessary and has been provided for in the budget.

Social Experimentation

The social experimentation element of this project is described in detail in section 3.6 above. This experimentation will also provide a useful tool for evaluating the success and quality of the project activities.

1. KAP survey will be used to assess any changes in understanding of, or attitudes towards, intellectual disability across stakeholder groups including participants in National Working Groups, family members, institution personnel and the children themselves.
2. KAP survey will allow for comparison of the above results with a control group comprised of policy makers in control countries and family members, institution personnel and children in a location within project countries which did not participate in child participation activities.
3. The degree to which objective two is attained for each project country will be measured by using self-assessment monitoring and evaluation tool developed for this project both prior to, and upon completion of, the project activities.
4. Completion of the self-assessment monitoring and evaluation tool by policy makers in up to three control countries will allow for an objective assessment of the degree to which objective two of the proposed project was fulfilled using and social experimentation methodology.

THE POLICY DIMENSION OF YOUR PROPOSAL

4. Which social need will the project address?

This project addresses a number of social needs including:

- ✓ Equitable access to inclusive health, education and social services which are responsive to the individualised needs of children with impairments and their families.
- ✓ The meaningful and active inclusion of children with intellectual disabilities in society.
- ✓ The harm caused by institutionalisation to health, development and life chances of some of Europe's most vulnerable citizens.

- ✓ Child poverty, since many of the services required to replace institutional care for children with intellectual disabilities are family support services that address child poverty.
- ✓ Combating the negative perception, exclusion and discrimination of vulnerable groups including children, individuals with disability, ethnic minorities (Roma) and families living in poverty.
- ✓ Increased understanding and agreement on the legislative and rights based framework for children with disabilities, including the Better Health Better Lives Declaration.

5. Which policy priority will be addressed in the project?

The primary policy priority addressed by the project is the social inclusion and social protection of children with intellectual disabilities and their families including fulfilment of their rights to equitable access to inclusive health, education and social services. Deinstitutionalisation and the development of inclusive community based alternative services is essential to fulfilling these rights and is also a policy priority addressed in this project.

In addition, the proposed project addresses all 10 of the policy priorities identified in the Better Health Better Lives Declaration.

1. Protect children and young people with intellectual disabilities from harm and abuse.
2. Enable children and young people to grow up in a family environment.
3. Transfer care from institutions to the community
4. Identify the needs of each child and young person.
5. Ensure that good quality mental and physical health care is coordinated and sustained.
6. Safeguard the health and well-being of family carers.
7. Empower children and young people with intellectual disabilities to contribute to decision-making about their lives.
8. Build workforce capacity and commitment.
9. Collect essential information about needs and services and assure service quality.
10. Invest to provide equal opportunities and achieve the best outcomes.

6. In what way does the project correspond to the objectives of the open method of coordination on social protection and social inclusion (social OMC)?

Social cohesion, gender equality and equal opportunities for all through the provision of adequate, accessible, flexible and sustainable social protection systems and policies.

This OMC objective is at the core of all proposed project activities. National Action activities aim to develop national policy and plans which enhance the social protection and inclusion of one of the most marginalised groups across Europe, children and young people with intellectual disabilities. In addition, the second strand of activities is specifically designed to lead by example and ensure that the right to equitable opportunities to contribute to social policy and decisions which affect their lives is upheld.

By promoting gender mainstreaming in all activities, this project will also serve to model good practice to all participants, including national level policy makers. An appropriate gender balance is reflected in the steering committee and will be ensured in National Working Groups and the PMT. Specific considerations of the links between single mothers in poverty and institutionalisation will be addressed in action planning sessions, as will the specific needs and additional risks for young girls with disabilities.

Effective and mutual interaction between the Lisbon objectives of greater economic growth more and better jobs and greater social cohesion, and with the EU's Sustainable Development Strategy.

Raising children in families, with appropriate community based support, ensures they can develop to their maximum potential. In addition, the genuine empowerment and inclusion of children and young people with intellectual disabilities dramatically improves their health, educational outcomes and life chances. As a result, many more of these children are able, as adults, to take up meaningful employment and to contribute to the country's economy, through taxation and purchasing power.

Therefore deinstitutionalisation and family support (Priorities 3 and 2 respectively of the Declaration) are directly relevant to the Lisbon objectives.

In addition, the deinstitutionalisation process usually requires the retraining and redeployment of institution personnel, many of whom move to work in community-based services. They usually provide a higher quality service and have greater job satisfaction. Increasing the capacity of the workforce in community based health and related services is Priority 10 of the Better Health Better Lives Declaration. In this regard, the Declaration priorities and deinstitutionalisation are directly relevant to the Lisbon objectives of creating more and better jobs.

Good governance, transparency and the involvement of stakeholders in the design, implementation and monitoring of policy.

This project pilots a unique model of good practice in the genuine participation of children with intellectual disabilities in the development of national policy and practice. Involving stakeholders at all levels in the project's national and transnational strand demonstrates, through example, good practice in governance and in designing government policy. In addition, the Better Health Better Lives self-evaluation tool which will be developed under the proposed project, will assist decision makers at all levels to be involved in the systematic monitoring of policy and the progress of its implementation. Finally, project partners will seek active engagement with the European Union and WHO Europe to further mutual learning and, upon completion of the project, feedback on lessons learned and areas of further need.

7. In what way do you consider the policy response to be developed in the project innovative?

The true and meaningful inclusion of children with intellectual disabilities in policy arenas remains a highly innovative exercise. This project will bring children with intellectual disabilities living in residential institutions together with those living in families and will bring both groups together with their non-disabled siblings and peers. In addition, children and young people with intellectual disabilities will attend working group and transnational meetings, providing an innovative and likely never experienced opportunity for policy makers across CEE to interact with an individual with a disability. In addition, the opportunities for transnational collaboration of stakeholders in an interactive workshop designed to facilitate their active engagement with each other and ability to share and learn from one another, represent a rare and innovative methodology to the action planning process. Facilitating connections between children at a local level and decision makers at the highest levels allows for the modelling of good practice of how to systematically translate international legislation into practical action.

8. How does the project contribute to enhance mutual learning?

Mutual learning is central to the proposed project, as reflected in the first objective: *to increase mutually beneficial partnerships and learning including transnational multi-sector cooperation and in-country collaboration of stakeholders*. A multi-sector Steering Committee and inter-ministerial, multi-stakeholder National Working Groups in each country are key to the realisation of this mutual learning. This will provide opportunities for their own growth and development as well as the enrichment of other project participants' knowledge and understanding of intellectual disability. Expert Mentors and meeting facilitators (all members of the Steering Committee) will provide insight and knowledge from countries which have previously undergone reform and will in turn learn from the National Working Groups they are facilitating. In addition, children and young people with intellectual disabilities will be actively included in all project activities. Furthermore, research and experience both demonstrate the learning and positive impact on the attitudes surrounding disability for non-disabled children when they are brought together with children with disabilities in this type of mutual learning.

The extensive dissemination planned in project countries and more widely across Europe through WHO Europe, Inclusion Europe, the Ad-Hoc group on deinstitutionalisation and the planned website, ensures a variety of stakeholders are able to access, and learn from, project activities and outputs.

To further enhance mutual learning, officers from European Commission DG Employment and DG Regional Development responsible for Bulgaria and the Czech Republic, as well as the officials from DG Enlargement responsible for Serbia's pre-accession will be invited as participant observers to attend Steering Committee meetings, national and trans-national meetings and the child-choice events. Lumos has worked closely with many of these officers on other projects and has previously provided training, and has been asked to provide additional training, on deinstitutionalisation for all country units of DG Employment and DG Regional Development.

Additional details on the project's ability to enhance mutual learning can be viewed under objective one in the Detailed Work Programme.

9. How will the project respond to the needs of the relevant target group(s)?

Children with Intellectual Disabilities: the proposed project places this target group at the core of all activities. National and transnational activities will seek to raise their visibility and ensure disability mainstreaming in national policies and programmes for children. Child participation activities will enhance individual children's self-esteem and decision making skills while also raising awareness of their rights and potential for other children, family members, personnel working in institutions, their larger community and members of National Working Group. This project will first and foremost hope to demonstrate to all stakeholders that children with intellectual disabilities are children first.

Families of Children with Intellectual Disabilities: This project aims to demonstrate to families the capacity of their children to contribute to decisions which affect their lives. Child participation activities will empower children and this change is likely to be visible to family members of children living at home. In addition, family members will be invited to observe or participate in child participation activities, including those in residential institutions, as long as it is safe for them to do so. In addition, national and transnational activities are aimed at ensuring the needs of children with intellectual disabilities and their families are considered and provided for in national plans and programmes for children. The proper process of deinstitutionalisation requires the development of preventative and social services, which will, in the longer term, ensure more families of children with intellectual disabilities will have the support necessary to provide for their children at home.

Policy and Decision Makers from all levels of Government: This project will serve to enhance their understanding of disability and the unique needs of children with intellectual disabilities. Through national mentoring and transnational workshops it will facilitate a national planning process and impart skills and attitudes which can be used in future policy and programmatic decisions. The self-evaluation tool will empower this target group to take further action for children with intellectual disabilities upon completion of the project.

Professionals and Service Providers: Modelling the true and meaningful participation of children with intellectual disabilities will serve to increase the capacity of professionals and service providers to further include these children in all aspects of their practice. Previous experience also suggests that, as institution personnel and other service providers realise the potential of children with intellectual disabilities, their job commitment and satisfaction increases. Strategies for communicating with children with intellectual disabilities and managing challenging behaviour will be modelled and taught during child participation activities.

10. What methodology will be used to carry out the activities of the project?

A detailed methodology of this project was described above. In summary, the implementation of the project will take the form of three strands of activities ongoing concurrently.

1. National and Transnational Action: A National Working Group will be formed in each of three project countries (Bulgaria, Czech Republic & Serbia) at the beginning of the project. This multi-stakeholder working group will consist of 10 members representing policy makers from various levels of government, service providers, NGOs and children with intellectual disabilities and family members. Through a series of three local meetings in each country and two transnational meetings with all 3 working groups, each country will be supported to develop a national action plan for the

social protection and social inclusion for children with intellectual disabilities in national policy priorities.

2. Child participation: a group of children with intellectual disabilities, both from residential institutions and family homes, will come together for a series of activities throughout the project. These activities will be led by a Local Coordinator in each country and supported by local Project partners. This will include consultation on the national action plans as well as events aimed at increasing the visibility and understanding of disability in local communities.

3. Social Experimentation: The self-assessment monitoring and evaluation tool and a KAP survey, used both pre- and post-intervention will allow for analysis of results across control and experimental groups.

The project will be supported by a multi-sector Steering Committee, External Evaluator, Project Management Team and Project Partners.

The proposed project would benefit from a two-tiered level of monitoring and evaluation including the internal and external evaluation activities described above. Details of how each project objective will be evaluated can be found in the detailed work programme attached.

The project has also been developed according to the following methodological best practices principles:

- ✓ Consultation with and participation of children with intellectual disabilities and their families
- ✓ The input of experts at all stages of the process
- ✓ The shared responsibility and guidance of all partner organisations
- ✓ Consultation and collaboration with a wide range of stakeholders
- ✓ The production of concrete deliverable outputs
- ✓ Internal monitoring and evaluation to ensure high quality efficient work
- ✓ External monitoring and evaluation to seek ongoing objective feedback on the quality of process, outputs and outcomes
- ✓ Wide publication and dissemination of the outcomes and outputs

Month/Year	Location	Activity/Output	Allocation of task per partner
Mid Sept 2011- mid Nov 2011 (Month 1-2)	London, Lumos Office (TBC)	First meeting of the project Steering Group- finalise methodology and tools, identify workshop facilitators including roles and responsibilities, discuss composition and formation of each country's national working group, plan the first transnational meeting, finalise evaluation framework with feedback from external monitor.	Lumos- member of Steering Committee; PM to organise logistics Pardubice- member of Steering Committee Karin Dom- member of Steering Committee External Evaluator: to attend, advise and feedback
		Recruitment of Project Coordinator (PC) Recruitment of Finance and Administration Officer (FAO)	Lumos organise recruitment and selection process All Partners: feedback candidates and final selection
		Begin identification of members for National Working Groups in each of the three project countries	Lumos: disseminate project information through local branches and networks; PM to engage and hold initial conversation with potential members. Karin Dom: disseminate project information locally, advice on potential working group members, begin identifying local children and family members for participation in working groups Pardubice: disseminate project information locally, advice on potential working group members, begin identifying local children and family members for participation in working groups Supporting organisations: disseminate project information through local member organisations
Mid Nov- Mid Dec 2011 (Month 3)	London, Lumos Office	Project Coordinator and Finance and Administration officers begin project work	Lumos: posts overseen by Project Manager (PM)
		Recruitment of Local Coordinators in each country	Lumos: PC to organise recruitment and selection process Karin Dom: disseminate job advert, assist with selection process of local coordinators. Pardubice: disseminate job advert, assist with selection process of local coordinators. Supporting organisations: disseminate job advert widely through local networks in each country

		Local Coordinators to begin forming child groups in each country as soon as in post	<p>Lumos: LC to organise and engage with institutions, local authorities, family members, and local partners</p> <p>Karin Dom: disseminate information about activities and help identify local children and families</p> <p>Pardubice: disseminate information about activities and help identify local children and families</p> <p>Supporting organisations: disseminate information through European networks</p>
		Assignment of Expert Mentor to each country	All: partners and Steering Committee to agree roles and responsibilities
	Bulgaria, Czech Republic or Serbia (as needed)	First visit to country from projected Expert Mentor or another member of the steering group if needed	TBD, see section 3.5.1
<p>Mid Dec- Mid Jan 2012 (Month 4)</p>	Bulgaria Czech Republic Serbia	First National Working Group Meeting in each country	<p>Lumos: logistical support to meeting from LCs and PC; LCs to sit on National Working Groups</p> <p>Karin Dom: staff member delegated to sit on National Working Group for duration of project.</p> <p>Pardubice: staff member delegated to sit on National Working Group for duration of project</p> <p>External Evaluator: to attend one of the country meetings and feedback to PMT and Steering Committee</p>
		Local coordinator to begin child participation activities	<p>Lumos: daily activities coordinated by LCs and PC; managed by PM; LCs primary responsibility for child participation activities.</p> <p>Karin Dom: participate in child activities locally as needed and able.</p> <p>Pardubice: participate in child activities locally as needed and able.</p>
Mid Jan- Mid Feb 2012 (Month 5)	Bulgaria Czech Republic Serbia	<p>National working groups ongoing action planning in preparation for transnational meeting</p> <p>Child participation activities continue</p>	<p>Lumos: daily activities coordinated by LCs and PC; managed by PM; LCs primary responsibility for child participation activities.</p> <p>Karin Dom: participate in National working groups; participate in child activities locally as needed and able.</p> <p>Pardubice: participate in National working groups; participate in child activities locally as needed and able.</p>

Mid Feb - Mid March 2012 (Month 6)	London, Lumos Office (TBC)	Steering group meeting	Lumos: PC and FAO to offer logistical support All partners to attend meeting External Evaluator: to attend and feedback
Mid Feb - Mid March 2012 (Month 6)	Czech Republic	Transnational Action Planning Workshop	Lumos: PM & PC primary responsibility for overseeing meeting preparation; FAO and Czech LC to offer logistical support All: participate in planning of workshop and designing of methodology and tools All: workshop facilitators to be agreed External Evaluator: feedback to PMT and Steering Committee
Mid March to Mid June 2012 (Months 7-9)	Bulgaria Czech Republic Serbia	National working groups ongoing work and drafting of the action plan continues; next steps undertaken as identified in transnational meeting Child participation activities continue	Lumos: daily activities coordinated by LCs and PC; managed by PM; LCs primary responsibility for child participation activities. Karin Dom: participate in National working groups; participate in child activities locally as needed and able. Pardubice: participate in National working groups; participate in child activities locally as needed and able.
Mid-June to Mid July 2012 (Month 10)	Bulgaria Czech Republic Serbia	Second National Working Group Meeting in each country	Lumos: logistical support to meeting from LCs and PC; LCs to sit on National Working Groups Karin Dom: National Working Group member Pardubice: National Working Group member External Evaluator: to attend one of the country meetings and feedback to PMT and Steering Committee
Mid July- Mid Aug 2012 (Month 11)	Bulgaria Czech Republic Serbia	National working groups ongoing work and drafting of the action plan continues; next steps undertaken as identified in 2 nd working group meeting Child participation activities continue	Lumos: daily activities coordinated by LCs and PC; managed by PM; LCs primary responsibility for child participation activities. Karin Dom: participate in child activities locally as needed and able. Pardubice: participate in child activities locally as needed and able.
Mid Aug- Mid Sept 2012 (Month 12)	Bulgaria Czech Republic Serbia	First complete Draft of National Action Plans for Children with Intellectual Disabilities Produced	Lumos: PMT to oversee timely production; LCs to manage National working group production and organise translation for Steering Committee
	Teleconference	Steering Committee Teleconference Meeting	Lumos: FAO to organise timing and dial in instructions All: Steering Committee (including all partners) members to review draft and plan follow up transnational workshop

Mid Sept- Mid Oct 2012 (Month 13)		Follow-up Transnational Action Workshop	<p>Lumos: PM & PC primary responsibility for overseeing meeting preparation; FAO and Czech LC to offer logistical support</p> <p>All: participate in planning of workshop and designing of methodology and tools; workshop facilitators to be agreed</p> <p>External Evaluator: feedback to PMT & Steering Committee</p>
Mid Oct- Mid Nov 2012 (Month 14)	Bulgaria Czech Republic Serbia	Child-Choice Event in each of the countries	<p>Lumos: LCs primary responsibility for planning, organisation and support for child-choice events, overseen by PMT.</p> <p>Karin Dom: help organise children and families to participate in event, help build excitement and publicity around the event locally; children from Centre and staff to participate in event as able.</p> <p>Pardubice: help organise children and families to participate in event, help build excitement and publicity around the event locally; children from region, including residential institutions participate in event as far as possible and safe</p> <p>External Evaluator: to attend one of event if possible and feedback to PMT and Steering Committee</p>
Mid Nov- Mid Dec 2012 (Month 15)	Bulgaria Czech Republic Serbia	Final National Working Group Meeting in each country	<p>Lumos: logistical support to meeting from LCs and PC; LCs to sit on National Working Groups</p> <p>Karin Dom: National Working Group member</p> <p>Pardubice: National Working Group member</p> <p>External Evaluator: to attend one of the country meetings and feedback to PMT and Steering Committee</p>
Mid Dec 2012 – Mid Jan 2013 (Month 16)	London, Lumos Office (TBC)	Final Steering group meeting: monitoring and evaluation of project; plan for and begin production of all outputs, evaluation and identification of ongoing support needs of each country to ensure sustainability.	<p>Lumos: PC and FAO to offer logistical support</p> <p>All partners to attend meeting</p> <p>External Evaluator: to attend meeting and support evaluation process</p>
Mid Dec 2012- Mid Feb 2013 (Months 16-17)		Consultative advice and support to continue throughout this period.	All Partners
		Final report writing; authoring of publications	<p>Lumos: PMT to coordinate production and offer logistical support</p> <p>All Partners to author outputs</p>
Mid Feb - Mid Mar 2013		Production of EasyRead outputs	<p>Lumos: coordination by PC and FAO</p> <p>All: feedback on drafts</p>

(Month 18)		Translation of outputs into all four project languages	Lumos: coordination by PC and FAO
Ongoing		Dissemination of all publications	<p>All partners to disseminate through their networks</p> <p>Lumos: host website; logistical support from PMT</p> <p>Pardubice: widely disseminate project information and outputs in Czech Republic</p> <p>Karin Dom: widely disseminate project information and outputs in Bulgaria</p> <p>Supporting organisations: widely disseminate outputs through their European wide membership organisations, website, conferences</p> <p>WHO Europe to disseminate outputs through Member State Representatives, Better Health Better Lives Initiative and other UN Organisations.</p>

ANNEX II Estimated budget of the action

1. Provisional budget in EUR

Headings and items	Sub-totals	Totals
COSTS		
NON-ELIGIBLE COSTS		
	Total non-eligible costs	0.00
ELIGIBLE COSTS (D + I)		
Eligible direct costs (D)		
Heading 1 - Staff costs	99 903.22	
Management	47 967.27	
Administration	36 003.00	
Accounting	8 332.95	
Other staff	7 600.00	
Heading 2 - Travel and subsistence allowances	59 700.00	
Travel	25 500.00	
Subsistence allowances (accommodation, meals, etc.)	34 200.00	
Heading 3 - Costs of services	36 735.00	
Information dissemination	5 750.00	
Translations	11 625.00	
Reproductions and publications	8 560.00	
Interpretations	10 800.00	
Heading 4 - Administration costs	18 250.00	
Hire of rooms	2 100.00	
Hire of interpreting booths	5 400.00	
Audits	1 000.00	
Other administrative costs	9 750.00	
Total eligible direct costs (D)	214 588.22	
Eligible indirect costs (I)		
Heading 5 - Overheads	10 000.00	
Overheads	10 000.00	
Total eligible indirect costs (I)	10 000.00	
Total eligible costs = D + I	224 588.22	
TOTAL COST OF THE ACTION		224 588.22
REVENUE		
COVER OF NON-ELIGIBLE COSTS		
Beneficiary's contribution to cover the non-eligible costs		0.00
INCOME		
Beneficiary's contribution in cash (C)		45 000.00
Revenue generated by the action (R)		0.00
Union grant (S)		179 588.22
Total income = C + R + S		224 588.22
TOTAL REVENUE OF THE ACTION		224 588.22

Additional information to the provisional budget

See attached document: 9 pages.

2. Calculation of amounts due under the present Agreement

2.1. DSAs (Daily Subsistence Allowances)

The daily subsistence allowance (DSA) is paid as a flat-rate amount and is considered to cover breakfast and two main meals, local travel, the cost of telecommunications, including fax and Internet, and all other sundries. They will be paid for each calendar day spent on mission away from the usual place of work, provided that the corresponding assignment is of a short-term nature. The DSA will vary according to the country in which the missions are to be carried out.

Daily subsistence allowances (DSA) are to be calculated as follows according to the length of the mission:

- 6 hours or less: reimbursement of actual expenses (on production of supporting documents);
- more than 6 hours but not more than 12 hours: 0.5 DSA;
- more than 12 hours, but not more than 24 hours: 1 DSA;
- more than 24 hours but not more than 36 hours: 1.5 DSA;
- more than 36 hours but not more than 48 hours: 2 DSA;
- more than 48 hours but not more than 60 : 2.5 DSA, and so on.

The agreed rates (in EUR per calendar day) to be used for the purposes of the present Agreement are set as follows:

Destinations		DSA in EUR	Maximum hotel price in EUR	Destinations		DSA in EUR	Maximum hotel price in EUR
AL	Albania	50,00	160,00	LI	Liechtenstein	80,00	95,00
AT	Austria	95,00	130,00	LT	Lithuania	68,00	115,00
BA	Bosnia-Herzegovina	65,00	135,00	LU	Luxembourg	92,00	145,00
BE	Belgium	92,00	140,00	LV	Latvia	66,00	145,00
BG	Bulgaria	58,00	169,00	ME	Montenegro	80,00	140,00
CH	Switzerland	80,00	140,00	MK	F.Y.R. of Macedonia	50,00	160,00
CY	Cyprus	93,00	145,00	MT	Malta	90,00	115,00
CZ	Czech Republic	75,00	155,00	NL	The Netherlands	93,00	170,00
DE	Germany	93,00	115,00	NO	Norway	80,00	140,00
DK	Denmark	120,00	150,00	PL	Poland	72,00	145,00
EE	Estonia	71,00	110,00	PT	Portugal	84,00	120,00
EL	Greece	82,00	140,00	RO	Romania	52,00	170,00
ES	Spain	87,00	125,00	RS	Serbia	80,00	140,00
FI	Finland	104,00	140,00	SE	Sweden	97,00	160,00
FR	France	95,00	150,00	SI	Slovenia	70,00	110,00
HR	Croatia	60,00	120,00	SK	Slovakia	80,00	125,00
HU	Hungary	72,00	150,00	TR	Turkey	55,00	165,00
IE	Ireland	104,00	150,00	UK	United Kingdom	101,00	175,00
IS	Iceland	85,00	160,00	XK	Kosovo	80,00	140,00
IT	Italy	95,00	135,00				

2.2. Travel expenses

Travel expenses relating to journeys effected in execution of the present Agreement: these expenses will be reimbursed within the following limits:

- the journeys have to be carried out by the most direct and economic route;
- train journeys: first class;
- air travel: special fares (Apex type) will be the normal basis of reference. The “full fare economy” will be accepted only on a case-by-case basis with proper supporting evidence – in any case it constitutes a maximum (air travel allowed only for distances above 400 km, i.e. return flight above 800 km);
- car journeys: equivalent of corresponding first-class train ticket.

Heading 1 - Staff costs

Management/Coordination (transnational and national)

Name	Name of organisation and function within the organisation	Status	Daily Salary cost	Number of days	Total
Project Coordinator (To be hired for this project if grant awarded)	Lumos, Project Manager: Words into Action	5 time (17.5 hrs/week) for 16 months. Temporary Part-Time position for purposes of this project	181.41	147.00	26 667.27
Three Steering Group Members to act as expert mentors to local working groups	One mentor per country to attend local working group meetings and provide distance support. Assignment of Steering Group Members as expert mentors will occur in consultation with local working groups at the beginning of the project-see description of action for additional details	7 mentor days per country	300.00	21.00	6 300.00
Two Steering Group Members to facilitate transnational workshops	All project partners and steering group members will participate in planning and designing the workshops, 2 Steering Group members will facilitate the first transnational 4 day workshop, 1 Steering Group member will facilitate the 2-day follow up transnational meeting. Both meetings will also be supported by the with Project Manager	transnational meeting: 4 days x 3 people=12; follow-up meeting 2 days x 2 people=4; planning=3	300.00	19.00	5 700.00
Steering Group Members and Project Partners to contribute to production of outputs and reports	All Steering Group Members and Project Partners to contribute-1 day per Steering Group member	10 days in total	300.00	10.00	3 000.00
Project Manager, Georgette Mulheir	Lumos, Director of Operations	1 day per month time to manage project over 18 months- Part of Lumos Contribution to funding	350.00	18.00	6 300.00

Total cost of Management/Coordination..... 47 967.27

Administration/Implementation of the project

Name	Name of organisation and function within the organisation	Status	Daily Salary cost	Number of days	Total
Local Coordinator Bulgaria-post to be filled; see description of action section 3.6.2 for details	Lumos, Local Coordinator Bulgaria: Words into Action Project	Temporary Full-Time position for purposes of this project. Full Time (35 hrs/week) for 12 months	54.55	220.00	12 001.00
Local Coordinator Czech Republic-post to be filled; see description of action section 3.6.2	Lumos, Local Coordinator Czech Republic: Words into Action Project	Temporary Full-Time position for purposes of this project. Full Time (35 hrs/week) for 12 months	54.55	220.00	12 001.00
Local Coordinator Serbia- post to be filled; see description of action section 3.6.2 for details	Lumos, Local Coordinator Serbia: Words into Action Project	Temporary Full-Time position for purposes of this project. Full Time (35 hrs/week) for 12 months	54.55	220.00	12 001.00

Total cost of Adminlstration/Implementation of the project..... 36 003.00

Secretarial costs

Name	Name of organisation and function within the organisation	Status	Daily Salary cost	Number of days	Total
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Total cost of Secretarial costs..... 0.00

Accounting

Name	Name of organisation and function within the organisation	Status	Daily Salary cost	Number of days	Total
Finance and Administration Officer - post to be filled with project funds	Lumos, Finance and Administration Officer, Words into Action Project	Temporary part-time position for purposes of this project. .25 time (8.75 hrs/week) for 16 months	114.15	73.00	8 332.95

Total cost of Accounting..... 8 332.95

Other staff

Name	Name of organisation and function within the organisation	Status	Daily Salary cost	Number of days	Total
Karin Dom, Bulgaria	5 days total time for project partner local staff to assist with national and child participation activities locally. Also to include assistance with data collection, evaluation and social experimentation	5 days total over duration of project	150.00	5.00	750.00
Pardubice Region	5 days total time for project partner local staff to assist with national and child participation activities locally. Also to include assistance with data collection, evaluation and social experimentation	5 days total over duration of project	150.00	5.00	750.00
Dr. Roger Banks	Lumos Consultant, External Evaluator for the project	15 days: 3 Steering Committee mtgs, 3 national mtg, 6 transnational mtgs, 3 day reporting	300.00	15.00	4 500.00
Carers/support workers	The individual carers and support workers of children and self-advocates will necessarily provide support at Steering Committee, National and Transnational Meetings	Support workers/ carers of specific children. Hired as needed for days of support services by Lumos	100.00	16.00	1 600.00

Total cost of Other staff..... 7 600.00

Total staff costs..... 99 903.22

Heading 2 - Travel, accommodation and subsistence allowances

Travel, accommodation and subsistence allowance

Please enter in "Daily cost per person" accommodation and daily subsistence allowance (DSA) costs

Purpose of the travel	Place of the event	Average travel cost per person	Number of people	Travel sub-total	Daily Cost per person	Number of people	Number of days	Subsistence and accommodation sub-total	Total
3 in-country working group meetings. Each meeting will host 10 local delegates for 1 day, travel included in DSA	Bulgaria	0.00	10.00	0.00	30.00	10.00	3.00	900.00	900.00
3 in-country working group meetings. Each meeting will host 10 local delegates for 1 day	Czech Republic	0.00	10.00	0.00	30.00	10.00	3.00	900.00	900.00
3 in-country working group meetings. Each meeting will host 10 local delegates for 1 day	Serbia	0.00	10.00	0.00	30.00	10.00	3.00	900.00	900.00
Attendance at in-country working group meetings for 1 international delegates/ facilitator per meeting (9 in total, 3 per country)	3 meetings each in Bulgaria, Czech Republic and Serbia	300.00	9.00	2 700.00	130.00	1.00	9.00	1 170.00	3 870.00
Attendance at in-country working group meeting for external evaluator to attend 1 meeting per country over project (3 in total)	1 meetings each in Bulgaria, Czech Republic and Serbia	300.00	3.00	900.00	130.00	1.00	3.00	390.00	1 290.00
Steering group meetings. 3 in-person meetings over the 18 month project for 10 steering group members + 2 carers/ supporters for persons with disabilities).	London	150.00	36.00	5 400.00	20.00	12.00	3.00	720.00	6 120.00
Transnational action planning workshop. Meeting participants include 10 local delegates (travel included in DSA) and 24 international delegates (10 each from Czech and Serbia working groups + 3 facilitators and 1 external evaluator)	Bulgaria	300.00	24.00	7 200.00	135.00	34.00	4.00	18 360.00	25 560.00
Follow up transnational workshop. Meeting participants include 10 local delegates (travel included in DSA) and 23 international delegates (10 each from Bulgaria and Serbia working groups + 2 facilitators and 1 external evaluator)	Czech Republic	300.00	23.00	6 900.00	135.00	33.00	2.00	8 910.00	15 810.00
Project Coordinator to visit each country to meet with Local Coordinators and monitor and support project activities. 2 visits per country for 2 days each over project duration	2 visits each to Bulgaria, Czech Republic and Serbia	300.00	6.00	1 800.00	130.00	1.00	12.00	1 560.00	3 360.00
Travel for Disabled Steering Group Members to attend teleconference meetings in person with PMT to ensure accessibility and their meaningful inclusion	London	200.00	3.00	600.00	130.00	1.00	3.00	390.00	990.00

Total of travel costs.....	25 500.00
Total of subsistence and accommodation costs.....	34 200.00
Total - Travel, accommodation and subsistence allowances.....	59 700.00

Heading 3 - Cost of services

Information dissemination

Nature of costs	Quantity	Unit cost	Total
Website, to be hosted on Lumos' site (www.lumos.org.uk) cost for 4 days production and associated fees	4.00	250.00	1 000.00
Production of easy read documents- to ensure all information and results are accessible to children and to individuals with disabilities	4.00	625.00	2 500.00
Production of CD-ROM's with all document outputs, child participation tools, reports and additional materials available in all project languages	3 000.00	0.50	1 500.00
leaflets/posters for child participation activities to increase visibility & inclusion in community (500 per country)	1 500.00	0.50	750.00

Total information dissemination..... 5 750.00

Translations

Total number of languages (the document is translated to) , Cost per page (1 page=1500 characters without blanks)

Description of documents to be translated	Languages from ... to ...	Total number of languages	Cost per page	Number of pages	Total
Guide to national planning; a pragmatic guide to national planning using the Better Health, Better Lives Declaration as a framework, sharing of experiences, reporting on the process, highlighting innovative aspects in planning and implementing change for children with intellectual disabilities.	English - French English - Bulgarian English - Serbian English - Czech	4.00	15.00	50.00	3 000.00
An Easy Read Version of the above project report to ensure all results and information are accessible to children and individuals with intellectual impairments. The EasyRead version will have significantly less words per page, reducing the pages costed for.	English - French English - Bulgarian English - Serbian English - Czech	4.00	15.00	10.00	600.00
A guidance manual and training module on how to ensuring the effective participation of children and young people with intellectual disabilities in national planning and decisions regarding their lives. To include the process followed during this project and lessons learned.	English - French English - Bulgarian English - Serbian English - Czech	4.00	15.00	50.00	3 000.00
An Easy Read Version of the above guidance manual focused on how children can be included and what to expect in this process. The EasyRead version will have significantly less words per page, reducing the pages costed for.	English - French English - Bulgarian English - Serbian English - Czech	4.00	15.00	10.00	600.00
A child written publication demonstrating their thoughts and feedback on the Declaration. This will largely take the form of pictures or drawings or video with few words needing translation.	English - French English - Bulgarian English - Serbian English - Czech	4.00	15.00	10.00	600.00
A self-evaluation monitoring and evaluation tool which provides a set of indicators for each of the 10 priorities in the Better Health Better Lives Declaration and allows countries to track their own progress and plan next steps.	From English to all of the other 33 PROGRESS Country languages	33.00	15.00	5.00	2 475.00
translation of draft action plans from project country language into English for review by steering committee and PMT.	Bulgarian- English Czech-English Serbian-English	3.00	15.00	30.00	1 350.00

Total translations..... 11 625.00

Reproductions and publications

Document	Number of pages	Unit cost	Total
Guide to National Planning; 100 copies each BG, CZ & SRB, 200 copies EN, FR (total 700)	35 000.00	0.07	2 450.00
child participation manual; 100 copies BG, CZ & SRB, 250 copies EN, FR (total 800)	40 000.00	0.07	2 800.00
self-assessment M&E tool; 100 copies all EU lang, 50 copies remaining PROGRESS lang (total 2800)	14 000.00	0.10	1 400.00
50 colour copies of each EasyRead action plan for 3 project countries (total 150)	3 000.00	0.10	300.00
colour copies of child publication 50 copies BG, CZ & SRB, 100 copies EN, FR(total 350)	7 000.00	0.10	700.00
colour copies of EasyRead guidance manual 50 copies BG, CZ & SRB, 100 EN, FR(total 350)	7 000.00	0.10	700.00
50 copies of each action plan for children with intellectual dis. BG, CZ & SRB (total 150)	3 000.00	0.07	210.00

Total reproductions and publications..... 8 560.00

Specific evaluation

Evaluator	Cost	Total
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Total specific evaluation..... 0.00

Interpretations

Meeting	Languages	Number of interpreters	Number of days	Daily cost per interpreter	Total
3 local working group meetings, 1 day per meeting - Bulgaria	Bulgarian-English	2.00	3.00	200.00	1 200.00
3 local working group meetings, 1 day per meeting- Czech Republic	Czech-English	2.00	3.00	200.00	1 200.00
3 local working group meetings, 1 day per meeting- Serbia	Serbian-English	2.00	3.00	200.00	1 200.00
Transnational Action Planning Workshop	English - Bulgarian English - Serbian English - Czech Republic	6.00	4.00	200.00	4 800.00
Transnational Follow up Workshop	English - Bulgarian English - Serbian English - Czech Republic	6.00	2.00	200.00	2 400.00

Total interpretations..... 10 800.00

External expertise

Task	Number of days	Daily cost	Total
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Total external expertise..... 0.00

Other Services

Service	Amount	Total
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Total other services..... 0.00

Total - Costs of services..... 36 735.00

Heading 4 - Administration costs

Depreciation for purchase of equipment

Type of equipment	Estimated depreciation cost
Total depreciation.....	0.00

Hire of rooms

Meeting	Number of days	Unit cost per day	Number of rooms	Total
Steering group meetings	3.00	200.00	1.00	600.00
Transnational Action Planning Meeting- Czech Republic	4.00	250.00	1.00	1 000.00
Follow up transnational meeting- Bulgaria	2.00	250.00	1.00	500.00

Total hire of rooms..... 2 100.00

Hire of interpreting booths

Meeting	Languages	Number of booths	Number of days	Unit cost per day	Total
Transnational Action Planning Meeting	Bulgarian Serbia English Czech	3.00	4.00	300.00	3 600.00
Follow up transnational meeting	Bulgarian Serbia English Czech	3.00	2.00	300.00	1 800.00

Total Hire of interpreting booths..... 5 400.00

Audits

Auditor	Cost	Total
External audit	1 000.00	1 000.00

Total audits..... 1 000.00

Financial costs

Nature of costs	Quantity	Unit cost	Total
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Total financial costs..... 0.00

Other administrative costs

Description	Cost
Child participation activities: materials, transportation, support workers, etc. (2250 per country)	6 750.00
Child-choice event budget (1000 per country)	3 000.00

Total Other Administrative costs..... 9 750.00

Total - Administration costs..... 18 250.00

Heading 5 - Overheads

Amount..... 10 000.00

Heading 6 - Income

Income

Own contribution after budget revision.....	45 000.00
Partner's contribution.....	0.00
Beneficiary's contribution in cash (C).....	45 000.00
Revenue generated by the action (R).....	0.00
Union grant (S).....	179 588.22
Total Income (T) (where $T = C + R + S$).....	224 588.22

Please check that you do not exceed the maximum percentage for Union funding established in the call for proposals. Based on the figures already filled in for the previous items, the percentage of the total eligible costs you are requesting is	79.96
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ANNEX III Technical implementation reports and financial statements to be submitted

See attached document(s): 12 pages.

ANNEX III TO THE GRANT AGREEMENT

Final activity report template to be used by beneficiaries whose actions have been awarded grants by Directorate-General for Employment, Social Affairs and Inclusion.

European Union programme for employment and social solidarity PROGRESS 2007-2013

This exercise should tell us how the EU-funded action has progressed and what was achieved in the funding period.

It is divided in three different parts.

- The first part refers to a more qualitative self-assessment of your work.
- The second part concerns quantitative information related to your work that we will request you to collect, compile and present. You are asked to fill in only the fields which are applicable to your action. This information will be used for the performance monitoring of your funding programme. *You will be able to compile most of the required information from your internal files. However, please note that in the case of events (seminars, conferences and similar) we expect you to carry out a short on-the-spot participants satisfaction survey which shall include the standard questions provided below. Depending on the internal needs of your work, your questionnaire may feature more questions, yet these other questions remain outside the scope of our monitoring work.*

Compulsory questions of participant satisfaction surveys Please scale the following aspects of the event on a 1-5 basis*

- Did the event match your needs? (5) (4) (3) (2) (1)
- Did you gain relevant knowledge and information? (5) (4) (3) (2) (1)
- Will you be able to apply such knowledge and information in your work? (5) (4) (3) (2) (1)

* 5 signifies "yes, agree strongly", 4 - "yes, somewhat agree", 3 - "neither agree nor disagree", 2 - "no, somewhat disagree" and 1 - "no, disagree strongly".

- Lastly, the list of evidence and annexes to be attached is given at the end of the third part.

This form must be completed in English.

The deadline for returning BOTH hard and electronic versions of your report is indicated in Article I.5 of your grant agreement.

QUALITATIVE INFORMATION

Results

Original goals

List the original goals and objectives of the action as set out in the grant agreement, and explain how they were met during the implementation period. Please,

- focus on the results/outcomes of your action (i.e., benefits to the target group(s) addressed by your action);
- include detail on what change your action has brought about;
- explain the added value of the action, i.e. the lasting impact and/or multiplier effect.

Important: please note that all activities and deliverables must be presented not here but in the next box.

Summary of progress of your action

Please summarise your action as well as any difficulties you have faced in implementing it.

Please report separately on each group of activities and/or component of your action.

Activity

Planned

Please shortly present your project plan/activity plan as outlined in the approved action grant agreement.

Implemented

Please describe the activities and deliverables in the action

Changes

- ☐ Yes
☐ No

Was there any variance from the original action plan?

Describe any variance from the original action plan. Describe how and why, provide justification of the change(s) made and impact on project implementation.

Transnational dimension

- ☐ Yes
☐ No

Has your project had a transnational dimension?

Describe the transnational dimension of the action.

Partners or stakeholders

- ☐ Yes
☐ No

Were there any partners or stakeholders involved in your project?

Please list here all partners or stakeholders and describe the contribution they made to the action. Has the role of any partner changed during implementation? If yes, please explain how and why.

Equality

How did you make sure that equality considerations were taken into account in your work? These can relate to ensuring an appropriate mix of people in your team, ensuring that all activities were accessible to all, making sure that all dimensions, in particular the gender dimension, were taken into account in your work.

Continuity

- ☐ Yes
☐ No

Is this action (or a related new action) to continue after European Union's financial support has come to an end?

Please explain the next steps.

Lessons learned and dissemination of results

Outcomes and lessons learned

What are the most important outcomes and lessons learned from the action?

What are the implications for relevant stakeholders? (such as the European Commission; national/regional/ local level policy-makers; social partners; opinion-makers including mass media, journalists; non-governmental organisations; academia, research institutions, think tanks; others where relevant)

Evaluation of the action

- ☐ Yes, external evaluation
☐ Yes, internal evaluation
☐ No

Did you carry out any evaluation of the action performed?

Please outline the key findings and conclusions of such evaluation.

News/success/best practices

We are very keen to hear about any success or good news from the actions that we fund. Please use the space below to tell us about any such news or if you have developed practices that you think others may

want to know about or could benefit from. Please attach any relevant supporting information or material or explain where others can access it (e.g., website)

Dissemination of findings

Adequate dissemination of findings and lessons is essential in ensuring the EU added value of the action.

Therefore, please explain and describe how you involved relevant stakeholders during the action and whether there was any feedback.

SUMMARY OF QUANTITATIVE INFORMATION

Please note that quantitative performance information must be submitted in relation to all outputs delivered during the implementation of the action grant.

Please also note that you will be requested to submit to the Commission the following quantitative performance information by 15 January. In that case the information has to cover only the outputs delivered as part of your action during the preceding calendar year (i.e., 1 January - 31 December). Such information will feed into PROGRESS Annual Performance Monitoring Report, which will be submitted to the European Parliament and the Council.

Reports

Were there any REPORTS (which include written outputs such as reports, analyses, studies, reviews, manuals, working papers, toolkits, etc.) produced as part of your action?

☐ Yes
☐ No

Total number of reports

Please provide the total number of independent written outputs, irrespective of whether they were published or not. An output produced in several languages counts as a single output.

Next please disaggregate the total number into the subcategories provided according to the written output's primary objective. A single output may fall into several categories (e.g., a study may aim at produce policy advice and at the same time to identify good practice).

Reports aimed at providing policy advice, research and analysis.

Reports aimed at identifying good practices.

Monitoring and assessment reports on the implementation of laws or policies.

Reports aimed at the development of appropriate statistical tools, methods and indicators.

Scope of dissemination

☐ Yes
☐ No

Have the reports been actively distributed?

Total number of material copies distributed

Please provide a total cumulative number for all the reports.

EU-level policy and decision-makers

National/regional/local-level policy and decision-makers

Social, economic/business partners

Civil society, NGOs

Academia, experts,
think tanks

Media, Journalists

If the reports have been published online,
please also provide the total number of their
downloads by unique users

Information / promotional material / website

Were there any INFORMATION/PROMOTIONAL
MATERIALS (including leaflets, brochures,
newsletters, websites, articles in media, video
material, etc.) produced as part of your action?

- ☐ Yes
☐ No

Total number of pieces of such
information and promotional material

Please provide the total number of various
information and promotion materials, irrespective
of their form/type of publishing (video, electronic
document, printed on paper, etc.). An output
produced in several languages counts as a single
output.

Total number of printed material copies

Number of copies in easy-to-read language for
disabled people

Number of copies in each language

Language

- ☐ English
☐ French
☐ German
☐ Other languages

Copies

Scope of dissemination

Next please provide the total cumulative number of the disseminated copies of these materials (e.g., printed/published copies distributed to your target audiences, number of downloads of the electronic copies published on websites, number of unique visitors to your information/promotional website(s), etc.).

Total number of material copies
distributed

EU-level policy and
decision-makers

National/regional/
local-level policy and
decision-makers

Social, economic/
business partners

Civil society, NGOs

Academia, experts,
think tanks

Media, Journalists

Total number of visits to websites related to
information and promotional (e.g., the website
of your action). The average no. of unique visits
per month during the reporting period.

Training / mutual learning

Were there any TRAINING/MUTUAL LEARNING
EVENTS (which include various trainings, peer
reviews and other forms of mutual learning)
organised as part of your action?

☐ Yes
☐ No

Number of trainings sessions, peer
reviews and other mutual learning
events

Total cumulative duration of these
events

Please sum up duration of the above events,
converted into full working day equivalent, i.e., 8
hours. For example, 1 four-day training (4 days) and
1 half-day round-table discussion (0,5 day) result in
total cumulative duration of 4,5 days.

Number of individuals who
participated in these events

Number of women among these
participants

Survey results

You were asked to carry out a short on-the-spot participants' satisfaction survey for each event organised. Please report on the survey results.

Event

Title of the event

Total number of participants

Total number of participants
responding to at least one compulsory
question

Next please report on participants satisfaction obtained from the standardised questionnaire.

Did the event match your needs?

Share of respondents
having responded
as 5 "yes, agree
strongly", per cent

Share of respondents
having responded
as 4 "yes, somewhat
agree", per cent

Did you gain relevant knowledge and information?

Share of respondents
having responded
as 5 "yes, agree
strongly", per cent

Share of respondents
having responded
as 4 "yes, somewhat
agree", per cent

Will you be able to apply such knowledge and information in your work?

Share of respondents
having responded
as 5 "yes, agree
strongly", per cent

Share of respondents
having responded
as 4 "yes, somewhat
agree", per cent

Other information and communication events

Were there any OTHER INFORMATION AND COMMUNICATION EVENTS (which include various seminars, conferences, round tables, networking events, etc.) organised as part of your action?

- ☐ Yes
☐ No

Number of information and communication events

Total cumulative duration of these events

Please sum up duration of the above events, converted into full working day equivalent, i.e., 8 hours. For example, 1 four-day training (4 days) and 1 half-day round-table discussion (0,5 day) result in total cumulative duration of 4,5 days.

Number of individuals who participated in these events

Number of women among these participants

Survey results

You were asked to carry out a short on-the-spot participants' satisfaction survey for each event organised. Please report on the survey results.

Event**Title of the event****Total number of participants****Total number of participants
responding to at least one compulsory
question**

Next please report on participants satisfaction obtained from the standardised questionnaire.

Did the event match your needs?Share of respondents
having responded
as 5 "yes, agree
strongly", per centShare of respondents
having responded
as 4 "yes, somewhat
agree", per cent**Did you gain relevant knowledge and information?**Share of respondents
having responded
as 5 "yes, agree
strongly", per centShare of respondents
having responded
as 4 "yes, somewhat
agree", per cent**Will you be able to apply such knowledge and information in your work?**Share of respondents
having responded
as 5 "yes, agree
strongly", per centShare of respondents
having responded
as 4 "yes, somewhat
agree", per cent

EXECUTIVE SUMMARY

With a view to disseminating all results obtained and outputs delivered under the grant agreement, all beneficiaries are requested to provide an Executive Summary which will be posted on the website of the Directorate-General for Employment, Social Affairs and Inclusion.

Upon a reasoned and duly substantiated request by the beneficiary, the Commission may agree to forgo such publicity, if disclosure of the information indicated above would risk compromising the beneficiary's security or prejudicing his commercial interests.

Such a summary should be written in English. It should be a stand-alone summary of the action and its implications. Thus it must be well thought out and presented as it may be a unique opportunity to publicise your work and your organisation.

Short description of the action

A concise description of the context in which the action was carried out, the target group(s) of the action as well as the key activities and deliverables.

1/2 page maximum.

Main objectives of the action

1/2 page maximum.

Key results

- Results/outcomes of the action, including benefits for main actors and target group(s)
- Added value of the action, i.e. the lasting impact and/or multiplier effect.

1 page maximum.

COMPULSORY MENTIONS OF EUROPEAN UNION SUPPORT

In accordance with the General conditions, all beneficiaries are under the obligation to acknowledge that the present activity has received funding from the Union in all documents and media produced, in particular final delivered outputs, related reports, brochures, press releases, videos, software, etc, including at conferences or seminars. In the context of the European Union Programme for Employment and Social Solidarity - PROGRESS, the following formulation shall be used:

This (publication, conference, training session etc) is supported by the European Union Programme for Employment and Social Solidarity - PROGRESS (2007-2013).

This programme is implemented by the European Commission. It was established to financially support the implementation of the objectives of the European Union in the employment, social affairs and equal opportunities area, and thereby contribute to the achievement of the Europe 2020 Strategy goals in these fields.

The seven-year Programme targets all stakeholders who can help shape the development of appropriate and effective employment and social legislation and policies, across the EU-27, EFTA-EEA and EU candidate and pre-candidate countries.

For more information see: <http://ec.europa.eu/progress>

For publications it is also necessary to include the following reference: "The information contained in this publication does not necessarily reflect the position or opinion of the European Commission".

With regard to publication and any communication plan linked to the present activity, the Beneficiary will insert the European Union logo and mention the European Commission as the Contracting Authority in every publication or related material developed under the present grant agreement.

SIGNATURE

Declaration

Title

First name

Surname

Position held in the organisation

Organisation name

I confirm that I am duly authorised to sign this declaration on behalf of the organisation named. I certify that the information given in this report is correct, and confirm that the enclosures are current, accurate, and adopted or approved by the organisation for which I lead. I understand that you may contact me to clarify any details in this report, including providing any supplementary information as applicable. I confirm that I am authorised by the organisation for this purpose.

On behalf of the organisation: date and signature

Check List

- ☐ Have you responded within the required deadline?
- ☐ Have you made sure that all your published material acknowledged support from the EU?
- ☐ Have you attached the documentation as required in your grant agreement:
 - The print-out of the duly completed, validated and submitted on-line final budget form SWIM which stands as your financial report;
 - Executive summary of your work in English in no more of 2 pages (see proposed structure). As indicated below, the Executive summary must contain a 1-page section on "Key results" of the action. The key results should be concise, sharp and easily understandable;
 - Printed and electronic copies of information and promotional materials funded by the grant (articles, leaflets, brochures, programme, stickers, posters, tapes, calendars, etc);
 - Printed and electronic copies of the reports, analyses, studies, reviews, manuals, working papers, attendance lists, toolkits, computer discs with information if available etc.) produced under your work;
 - For all events, the list of participants with original signatures of all participants.
- ☐ Have you completed the declaration with the correct signatories?
- ☐ Have you submitted ONE original and ONE hard copy of the final activity and financial reports as well as the supporting evidence and ONE electronic copy of all documents?