



## Notes on Carrying Out a Funded Event

October 2018

### General

All organizational activities are the responsibility of the applicant / scientific organizer. The Foundation needs to be informed on a regular basis of the current state of affairs.

Upon request, part payment of the agreed funds may be made to an account given by the applicant. If this is a university account, it has to be ensured that this account can be easily accessed and that no fees are charged for the administration of the funds. Alternatively, a personal account may be opened. The Foundation can also pay certain costs (hotels, meals) directly.

In general, the funds should be used carefully and economically. The funds are to be used to cover the costs of meals and accommodation for all participants, the speakers' and scientific organizers' travel costs and, to a certain degree, for organizational costs. The Foundation needs to approve any switches between the various types of cost incurred. As a rule, honoraria are not paid.

It is important for the Foundation that it is the sole financier of a WE-Heraeus event, such that partnering with companies or other organizations – as co-financers, sponsors or exhibitors – requires prior consent.

### Announcements

The scientific organizer will announce the event via a website, which the Foundation will link to in its calendar of events. All announcements and the program must bear the Foundation's logo (available from: [www.we-heraeus-foundation.de/Downloads](http://www.we-heraeus-foundation.de/Downloads)) and be approved by the Foundation.

All seminars are consecutively numbered and normally referred to as "xxx WE-Heraeus Seminar". Physics schools are referred to as "WE-Heraeus Physics School" or "WE-Heraeus Summer School".

### Participants

With regard to equal opportunities, the Foundation requests that the scientific organizer selects an appropriate number of women, both among the speakers and the participants. The aim should be for a minimum of 20 %.

As a rule, the managing director of the Foundation will take part in the event and present the Wilhelm and Else Heraeus Foundation in his welcoming speech. In addition, each participant will receive an informative flyer from the scientific organizer (available from the Foundation office).

### Travel costs

The Foundation bears the accommodation costs for the invited speakers and those of the scientific organizers as well as subsidizing travel costs up to the following amounts: 250 € (travel within Germany); 500 € (Europe), 1,000 € (rest of the world). The budget for travel costs will be stated in the approval letter.

The costs are calculated when flying economy class, traveling second class by train or 30 cents/kilometer driven when traveling by car. The budgeted funds for travel costs may not be used for other expenses without the Foundation's permission.

The travel cost subsidies should only be used if no other financing is possible.

The best method has proven to be reimbursing travel expenses in cash and having the recipient sign to confirm receipt. With reimbursements by bank transfer after the event it can be difficult to collect missing receipts in good time, plus the fact that transfers to foreign accounts in particular are expensive and time-consuming.

### Fees

For the WE-Heraeus Physics Schools as well as WE-Heraeus seminars, Heraeus workshops and events that are not held in Bad Honnef, the Foundation recommends charging participants between 100 and 200 euros depending on the duration of the event. The best method has proven to be taking the participants' fees in cash at the event and issuing a receipt.

## Certificates

The participants of the Physics Schools should receive a certificate from the organizer at the end of the event. These will be issued by the Foundation office, as long as the names of the participants are submitted in a suitable form. Otherwise the Foundation will make blank certificates or an electronic version available.

## Report

The scientific organizer is requested to write a short report within four weeks of the event, outlining the program, results and the benefits (max. 2,500 characters = 1 DIN A4 page). The report (in German!) will be published in Physik Journal and on the Foundation's website (where sample reports are to be found); in WORD format, please.

## Final accounts

The following procedure has proven best when administering the funds and for the final accounts with the Foundation:

1. List of the **names and addresses of all participants** (audience and speakers) together with their signatures as proof of attendance.
2. Clear overview of the **travel costs** (subsidies) paid with the recipients' signatures. If these were paid in cash, the amount is to be calculated using the tickets, receipts, etc. submitted as well as the amount of estimated return travel costs. The Foundation does not need individual receipts in this case, but does definitely require proof of payment by way of the recipient's signature. If the money is transferred, then a copy of the transaction is needed.
3. Clear overview of the **participant fees** received as signed for by the participants. The participants are given a receipt. If the attached list is not used, copies of the receipts or bank statements need to be submitted.
4. All other payments need to be itemized individually (e.g. stationery, invoices, food and drink).
5. Restaurant bills, taxi receipts, gifts, etc. must bear the reason and name(s) of the people concerned.

**It is easiest if 1 – 3 above are entered on a single list – see the attached sample.**

The Foundation expects a final list of accounts at the latest two months after the end of the event, which should be structured as follows for reasons of transparency:

1. Speakers' travel costs
2. Accommodation costs and for meals and drinks, inc. interval drinks and snacks.  
The Foundation cannot under any circumstances bear the costs for any people accompanying the speakers or participants. These people may not appear on any statements (e.g. hotel bills).
3. Any costs of sidebar programs (excursions, get-together evenings, etc.)
4. Any organizational costs, subdivided according to: a) stationery, b) personnel (named with signed receipt of honorarium), c) miscellaneous.
5. Any income from participant fees.

The costs of the "sidebar program" and for "organization" together may only amount to 25% of the total costs. Costs for equipment and supplies may only be covered to a reasonable amount, for the exclusive use of and around the time of the event.

The Foundation expects a clear (tabular) listing, with all the receipts numbered.