

EUROPEAN COMMISSION

DIRECTORATE-GENERAL  
EDUCATION AND CULTURE



**EU/US ATLANTIS Programme**  
**Cooperation in Higher Education and Vocational Training**

**INTERIM REPORT**

**For a Policy Oriented Project**

## General instructions

### 1. Overview

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The Interim Report for the project comprises the following parts:

<b>Part 1</b>	Confirmation of the basic data on the project and the partnership.
<b>Part 2</b>	A description of the project activities, products and results during the reporting period and schedule for the remaining period.
<b>Part 3</b>	The budget situation and financial plan for the remaining period.
<b>Annexes</b>	Codes to be used

### 2. General guidance

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- You should carefully read the Guidelines and the explanatory notes on the budget annexed to the contract before filling in the reporting forms.
- The Interim Report is submitted by the Beneficiary on behalf of all the organisations participating in the project. The declaration on the following page confirms that a process of consultation and approval has been carried out throughout the partnership. It is therefore important that the required information should be collected in good time before the deadline for submission of the Interim Report.
- The Report must be submitted in one of the **official languages** of the European Union.
- **Two paper copies of the Report** must be sent no later (as per postmark) than by the deadline specified in the agreement to:

**EACEA - Education, Audiovisual and Culture Executive Agency**  
ERASMUS MUNDUS and EXTERNAL COOPERATION

Avenue du Bourget n°1 - BOUR 00/32  
B - 1140 Brussels

- Please note that you should send **ELECTRONIC version** of the report to the mailbox: [EACEA-EU-US@ec.europa.eu](mailto:EACEA-EU-US@ec.europa.eu)
- When applicable, you have to attach to your Report **one copy of outputs** finalised during the reporting period. If you refer to web sites, passwords should be given for all private areas.
- You are strongly advised to send your Reports by registered post to ensure a record of postage. Additionally, you are advised to keep a copy of the full report, including any annexes.

**Please note that a late submission of the Report may result in penalties or even cancellation of the Financial Agreement, in accordance with the general conditions of the Agreement.**

### 3. Notice

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- The approval of the Interim Report by the Agency is without prejudice to the Agency's right to suspend the activities of a project, terminate an agreement or take any other appropriate step should subsequent verifications reveal problems or significant divergences from the work plan, the financial plan or the conditions of the agreement as approved.
- The financial part of this report is intended for information purposes only, to assist the overall monitoring of the project. Therefore, the approval of the Interim Report and payment of the relevant instalment of the grant, in accordance with the terms of the agreement, should under no circumstances be considered as indicating that the Agency has accepted the declared expenditure. Detailed examination of the budget to identify the eligible expenditure and amount of the final grant will be carried out only at the final report stage.
- Please note that in case of any major changes to the work plan, products and results, or to the project budget, a formal request of amendment must be submitted.
- The Agency reserves the right to modify this annex if necessary. Any such change will be notified to Beneficiaries in writing.

## Checklist and declaration

<b>Checklist</b>	<input checked="" type="checkbox"/>
Please check the following points before submitting your Interim Report	<input checked="" type="checkbox"/>
There are three complete and securely bound copies of the Interim Report.	<input type="checkbox"/>
One copy of the prototypes / interim versions of the products and results is included.	<input type="checkbox"/>
The <i>Declaration by the Beneficiary</i> below has been signed and stamped by the legal representative of the Beneficiary. One copy of the Interim Report bears an original signature	<input type="checkbox"/>
Part 1 (Project Data) of the Report has been duly amended or approved.	<input type="checkbox"/>
You have answered all the questions in Part 2 of the Report.	<input type="checkbox"/>
Section 2B has been read and approved by US coordinator.	<input type="checkbox"/>
You have completed the summary table in Part 2C of the Report.	<input type="checkbox"/>
<b>Declaration of Expenditure</b>	
All expenditure presented in Part 3 of the report is eligible.	<input type="checkbox"/>
The expenditure is consistent with the activities undertaken during the reporting period.	<input type="checkbox"/>
All tables have been completed in €.	<input type="checkbox"/>
The Declaration of Expenditure has been checked by the accounts or finance department of your institution. In particular, the totals of the table 3.2 are equal to the totals shown in the general table (Table 3.1).	<input type="checkbox"/>

## Declaration by the Beneficiary

**Financial Agreement number:** 2006-4563/005

I, the undersigned, hereby declare that the information contained in this Report is accurate and in accordance with the facts. In particular the financial data provided in this Report corresponds to the expenditure actually incurred by the project partners for the execution of the project activities. This information has been checked and approved by the partners involved in the activities set out in this Report.

Signed in: \_\_\_\_\_ on    /    /

*Signature of the Beneficiary's legal representative*

*Name and function in capital letters*

Seal/stamp of the organisation

## Part 1: Confirmation of project data

- Please check carefully data concerning partner institutions provided in your application forms.

**You should indicate any modifications and, if necessary, provide the correct data on a separate sheet. Please note that changes in the partnership require a prior Agency's approval. Requests for amendments to the partnership should be made as early as possible.**

EU2. BROOKES	Prof. Steven King	Consultant – expert on welfare and philanthropy	231
	Prof. Paul Weindling	Researcher – expert on health education programs	231
	<b>Mr Tim Philipson</b>	Researcher – focusing on database and evaluation of programs	244

**Tim Philipson replaces Derek McMillan, who has left the University of Oxford Brookes. He will work on finessing the database and assemble the documentation needed for an evaluation of programs.**

If applicable, please give new website address(es) below, along with any login names and passwords required to access its internal sections.

<b>Website address</b>	<a href="http://www.philanthropy.iupui.edu/Partnerships/Benphe/index.html">http://www.philanthropy.iupui.edu/Partnerships/Benphe/index.html</a>
Login name (if applicable) for database	Partner
Login password (if applicable) for database	atlantis

## Part 2: Description of project activities, products and results

This section describes the activities of the project. It is divided in three sections.

**Section 2A** – Summary of the activities undertaken during the reporting period. Summary of the activities to be undertaken during the rest of the project duration.

**Section 2B** – An overall description of the project activities, products and results.

**Section 2C** – A list of products and results.

## Section 2A - Summary of the Activities

Please describe clearly and briefly by using the two tables below the activities undertaken / to be undertaken during the project. Please divide the work in components as in the work plan of your original application (or as amended). Please include a copy of the original (or amended) work-plan.

### Project Activities undertaken during the reporting period.

<i>Component of project</i>	<i>Start to end dates</i>	<i>Activities undertaken (with indication of major divergence with workplan)</i>	<i>Partners involved</i>	<i>Products and results so far</i>
1. Institutional survey on nonprofit education & training in EU and US	Nov 2006 to Dec 2007	<i>Phase A:</i> Web-based surveys on EU academic programs	1. UNIBO 2. BROOKES 3. ESH	Comprehensive database of European Academic programs and identification of benchmark criteria to focus on a smaller sample for qualitative interviews in phase B
2. Placement survey within the partner's countries	May 2007 Oct 2007	<i>Phase C:</i> Job placement survey - Comparative study made in relation to a sample of Italian graduates	4. ALMALAUREA	Preliminary report "The Italian Philanthropy graduates framework in the AlmaLaurea surveys –Quantitative analysis and methodological proposals."
3. Transatlantic Conferences, Continental Workshops	2007 and 2008	Qualitative analysis of the data; study of curricula	1. UNIBO 2. BROOKES 3. ESH 4. ALMALAUREA	Agreed on the main objectives and procedures to follow (see table related to partners meetings)
4. Project evaluation plan	Nov-Dec 2006 and Apr-Sep 2007	Methodological analysis on the data collection	4. ALMALAUREA	Data qualitative analysis and methodological proposals regarding component 1 and 2 of the project
5. Implementation of the Web site and database	Mar 2007 to Nov 2007	Dissemination of the results	1. UNIBO	Elaboration of data, production of reports and minutes, database and webpages

## Project Activities to be undertaken during the rest of the project duration.

<i>Component of project</i>	<i>Start to end dates</i>	<i>Activities to be undertaken. Indicate also any foreseen major divergence from the original workplan</i>	<i>Partners involved</i>	<i>Foreseen products and results</i>
2. Institutional survey on nonprofit education & training in EU and US	Nov 2007 to Mar 2008	<i>Phase B:</i> Online and email distribution of questionnaires, telephone interviews.	1. UNIBO 2. BROOKES 3. ESH	Expansion and qualitative improvement of the Comprehensive database of European Academic programs
2. Placement survey within the partner's countries	Jan 2008 to May 2008	<i>Phase C:</i> Telephone interviews to a sample of former students of academic programs and nonprofit trainings  <i>Phase D:</i> Telephone interviews and email survey to a sample of non profit and philanthropy employers	2. BROOKES 3. ESH 4. ALMALAUREA	Report on the analysis of the expectations and needs of the nonprofit sector as a potential employer and best curricula in terms of job placement
3. Transatlantic Conferences, Continental Workshops	Feb 2008 and summer 2008	Qualitative analysis of the data; study of curricula	1. UNIBO 2. BROOKES 3. ESH 4. ALMALAUREA	See table on partners conferences
4. Project evaluation plan	Jun-Nov 2008	Methodological analysis on the data collection	4. ALMALAUREA	Data qualitative analysis and methodological evaluation of the whole project
5. Implementation of the Web site and database	Jan 2008 to Nov 2008	Dissemination of results	1. UNIBO	Elaboration of data, production of reports and minutes, database and webpages

**Partnership Meetings held during the reporting period**

Place		-Date	Partners attending	Purpose of the meeting	Key results (summary of the minutes)
Country (use code)	Town				
Belgium (BE)	Brussels	18–20 March 2007	UNIBO, ESH, IUPUI, GVSU, ASU	General conference in concomitance with the Atlantis introductory meeting	Established priorities for BENPHE, modified initial workplan to focus on graduate programs, introduced discussion on methodological approach and dissemination plan
Sweden (SE)	Stockholm	30 August– 1 September 2007	UNIBO, ESH, ALMALAUREA, IUPUI	Local workshop to share first result of European survey and agree on future steps	Implemented the database framework, analyzed the main trends and discussed about criteria and methodological issues of phase B and C
United Kingdom (GB)	Oxford	18–21 October 2007	UNIBO, BROOKES, TRINITY COLLEGE (as observers)	Follow up for the Stockholm meeting to report and discuss data and procedure with BROOKES (absentee in previous meeting) and a potential new partner (Trinity College)	Implemented the database framework, analyzed the main trends and discussed about criteria and methodological issues of phase B and C

**Partnership Meetings planned to be held during the rest of the project period.**

Place		Estimated date	Partners attending	Purpose of the meeting	Foreseen key results
Country (use code)	Town				
Canada (CA)	n.a.	February 2008	UNIBO, ESH, ALMALAUREA, IUPUI, BROOKES, ASU, GVSU	In concomitance with transatlantic general conference, analyze the framework of possible international curricula	Identification of best practices and, consequently, of a curriculum for a graduate programme; and inclusion of possible new partners in the consortium
Italy (IT)	Bologna	Summer 2008	UNIBO, ALMALAUREA, ESH, BROOKES	Local workshop to conclude the BENPHE and evaluate future opportunities	Discuss result of phase C and D, including qualitative interviews, study of a possible transatlantic curriculum based on the bestpractices

## Section 2B – Overall Description of the Project

### Description of Activities (maximum 10 pages)

Please provide a short description, which gives an account of the project's work during the reporting period and summarises the foreseen activities during the rest of the project period. The report will be drafted with reference to the original proposal on the basis of which EU funding was granted or, if subsequently amended with Agency's approval, to the amended proposal.

The report will cover all subjects addressed in the original or amended proposal for the period in question. Each report will be presented in such a manner that the comparison between what was initially proposed and what has been achieved can be easily established. Please describe any **divergence** from the initial project plan (aims and objectives, work programme, products, partnership, and budget). Give the reasons for the changes.

When targets have not been achieved fully or in part, reports will:

- a) provide clear and concise explanations for not achieving them;
- b) propose appropriate remedy action and a timetable to meet them in the remaining duration of the project.

During the first year of the BENPHE project the trends indicated in the original proposal have been confirmed by the preliminary research and observations gathered at the first conferences and workshops. For example, the growth in nonprofit and nongovernmental organizations has been accompanied by a concomitant growth in the number of higher education and training programs. By choosing to focus on structured training programs, offered mainly by universities, the partners recognized the opportunity to consolidate and expand the current consortium, including non academic institutions as well. The goal was and still is to recognize the best-practices already existent in the field and integrate both European and US partners experiences with the possibility to create the ground of a transatlantic academic program.

In the definition of the research framework we took into account the big divide between the American traditions dominated by scientific philanthropy since the last century and the distinctive European traditions which are deeply rooted in the framework of different national civil societies.

With reference to the main innovative elements from original proposal,

- 1) *the production of data collected through on-line surveys, interviews, exploration of Web sites, and analysis of evaluative materials;*
- 2) *reports on the growth of academic programs, seeking to understand the variations in program types adopted from place to place;*
- 3) *comparison at the macro level (contrast of contexts from the point of view of the institutional, educational and socio-anthropological framework on the two continents);*

These elements have been thoroughly discussed during the joint conference and two "local" team workshops. As showed in the attached meeting minutes, and following the original proposal:

- *The first conference (Stockholm) has been devoted to presenting and discussing the database, to defining the criteria of comparison within the two continents (Europe and the United States) and between them by analyzing the best models in the U.S. and in Europe and defining the process of cross-fertilization, adaptation and assimilation on both continents.*

The result has stressed out also some difficulties in terms of different interpretations of what could fall under the concept "philanthropy" and "non profit", but especially what

differences arise from national educational systems. For example the Nordic partners emphasized some negative connotations with terms such as “charity” or “philanthropy” for their resemblance of old-style top-down individual assistance, while other areas of study such as “civil society” and “complementary social service provision” has been changed in recent years, with a growing interest for the non-profit sector. Similar observations from other countries explain the plethora of synonyms or umbrella concepts in different languages. This fact has slowed down the identification of common criteria to for the micro-level analysis. Nonetheless, we came up with a broad spectrum of programs oriented to themes connected to non profit and philanthropy, looking at different subject areas represented by the following taxonomy included in the database:

- Cultural, Leisure or Sport Studies
- Economics, Business Administration and Management Studies
- Education or Pedagogy
- Historical, Philosophical and Religious Studies
- International Cooperation and Development Studies
- Public Administration
- Social work, Health Care
- Voluntary and Civil Society
- Others

The aim is to constitute a database of academic programs similar to the one already available to the US partners thanks to the Census of Nonprofit Management Programs <http://tltc.shu.edu/npo/>

Consequently, each European partner analyzed the current configuration of academic programs in the following geographic areas, with a web-based survey:

*University of Bologna-MISP*: France, Spain, Germany and East Europe (Croatia, Slovenia, Serbia, Poland, Bulgaria, Rumania and Hungary). In addition to the original plan, we included also Belgium, Netherlands and Switzerland.

*Oxford Brookes University*: UK and Ireland.

*Ersta Sköndal University College*: Norway, Sweden, Denmark, and Finland

The survey identified more than 300 academic programs with heterogeneous approaches to the non profit sector and philanthropy, even though some common trends amongst country could be drawn.

- a large majority of academic and training courses focusing on management (both from an economical or public administration perspective)
- most of the courses have an strong “operative” aim, and are often offered as a professional qualification only in few cases with links to previous undergraduate degrees, generally in economics or political sciences
- for the previous reason, short graduate programs (professional masters and Masters of Art) with concentration of subjects pertinent to non profit issues prevail, and are frequently based on non academic organizations
- existing undergraduate programs do not seem to adequately shape specific professional profiles

As a result, the main change to the original proposal of focusing on a possible framework for developing a future transatlantic *undergraduate* program is clearly the shift to a possible *graduate* program. Furthermore, the indications emerged during the Atlantis conference in Brussels (March 18<sup>th</sup>-20<sup>th</sup> 2007) follow the same direction: several issues have risen from existing transatlantic consortia, suggesting that the feasibility of undergraduate programs is at risk. The advantage of focusing on the

graduate program is the shorter time frame (from 3 to 2 years), the higher average-age of participants and the fact that some basic linguistic/cultural skills have already been gained at academic level. Last but not least, a graduate program would match the need for professional impact being more flexible and job-market oriented.

This vision is clearly in line with the initial outcome of the BENPHE, which has found very few instances of undergraduate program concentrating courses on non profit subjects, as opposed to a larger offer of graduate courses, masters and professional certificates (see attached sample from the comprehensive database)

However, the main questions that each of the partners has posed still remains: “what would a curriculum in this field look like?” (see Stockholm minutes) The US lead partner gave a overview of the possibility and challenges of developing such curriculum based on 50 years of history of non profit education. On this side of the Atlantic, opportunities and challenges of the European system after the so called “Bologna process” were addressed by participants.

At operational level we encountered several practical difficulties both in finding accurate list of academic programs but especially in finding all the information required to orient the qualitative selection of programs for benchmarking purpose (for a detailed report see minutes of the August 31-Sept. 1, 2007 meeting in Stockholm)

That’s why at micro level, as indicated in the original plan “4) *comparison at the micro level (identification of best practices in educational programs on both continents)*” we have not been completed yet.

As a result, the work plan has been slightly revised, with the partition of the first component, the ‘**institutional survey**’ (see Sec2A) into two phases

- **Phase A** Implementation of a comprehensive database of European Academic programs through a web based survey and publication on the web site. As mentioned before, this phase has been completed with the participation of all partners. The database will be soon available to the public through the website <http://www.philanthropy.iupui.edu/Partnerships/Benphe/index.html> for possible integrations and amendments
- **Phase B** Identification of benchmark criteria and focus on a smaller sample for qualitative interviews. Based on the result of phase A, specific criteria have been indicated (such as presence of an academic curriculum focusing mainly in the non profit area with exclusion of programs limited to elective courses; existence of at least two consecutive editions of the program) to select qualitative sample to conduct in depth interview with deans, directors and professors. The interviews will be conducted in the next few months with the idea of assessing:
  - existence of international credits
  - curriculum level and history in terms of continuity from undergraduate to graduate programs up to PhDs and research
  - solidity of the faculty (performance of professors and researchers)
  - number of students involved

The expected outcomes are:

- Confirm and increase the information collected in phase A, integrating the database with a qualitative review of the programs
- Point out strengths and weaknesses of the academic programs, as well as current and future changes
- Evaluate the possibility of future partnerships

- Investigate the presence of existing job placement researches for non profit educational programs to be used in phase C

The second component of the work plan, '**Placement survey**' has been also partitioned into two phases to

- **Phase C. A survey on the students in order to evaluate the placement opportunities after a “nonprofit” degree.** AlmaLaurea, thanks to their competence and experience in this particular field, has elaborated a preliminary report “The Italian Philanthropy graduates framework in the AlmaLaurea surveys –Quantitative analysis and methodological proposals.” AlmaLaurea is a consortium of 50 (out of 80) public and private universities in Italy. The purpose of the research was to identify inside the whole AlmaLaurea database those graduates awarded with a Philanthropy related degree with the purpose to gather preliminary information on:
  - General characteristics and study performances
  - Job/study conditions and labour market insertion

The focus was on undergraduate programmes, focusing on:

- Non-profit organizations
- NGOs and social enterprises
- Civil society organizations and voluntary services
- International cooperation

In total some 224 graduates from 2005-06 were identified. A comparative study was made in relation to a sample of Italian graduates from the AlmaLaurea database. The similarities and differences could be found regarding job placement and job satisfactions, as well as the different categories of students. The conclusion of this phase will include a sample of students to be selected within the partner’s national programs, using a methodology and questionnaire analogue to the one adopted by AlmaLaurea.

- **Phase D:** Survey to analyze the expectations and needs of the nonprofit sector as a potential employer. It will consider foundations, NPOs, NGOs, public administrations and CSR programmes. The questionnaire will be disseminated both via electronic and postal mail and will be addressed to university centers as well as to the members of associations of nonprofit academics and researchers (including the Association for Research on Nonprofit Organizations and Voluntary Action, and the International Society for Third Sector Research). The methodology and content of the survey as yet to be defined.

## Conclusions

The conference and workshop in 2008 will be dedicated to the identification of best practices and, consequently, of a curriculum for a graduate programme; and inclusion of possible new partners in the consortium

- Challenges (uniform the different educational systems and conceptions of philanthropy, civil society and non profit organizations)
- Added value of the project (identify an international graduate programme that overtakes the current differences)

The foundation of this project is an existing strong relationship established at a master degree level between the “Master in International Studies in Philanthropy and Social Entrepreneurship” (MISP) at the University of Bologna (Italy) and the “Master of Arts in Philanthropic Studies” at the Center on Philanthropy at Indiana University in Indianapolis (United States), which could benefit from the BENPHE result by expanding the transatlantic exchange of students and professors, consolidate and improve the existing curricula, include the partners in a larger and more effective program in terms of job placement and response to the cultural and operational needs of the European non profit sector.

At the same time the project will disseminate the results of the research outcomes in the framework of already existing and well-established academic and professional national and international networks. The intention is to produce results that can be used as frameworks and blueprints for further higher education programs development on both continents. As a result, the main goal and element of a project evaluation is to define the conditions that can reduce (in the structuring of an educational program at the undergraduate level) the risk of scepticism of practitioners about the quality of the university programs in teaching and research.

<b>Signature of the EU Project Leader</b>	<b>Date</b>
<b>Signature of the US Project Leader</b>	<b>Date</b>

<b>Financial Agreement number:</b>	<b>2006-4563/005</b>
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## Section 2C –List of Outputs

In this part you are required to present an overview of outputs of your project.

### **Summary table relating to project products and results**

Please list here all foreseen outputs of the project. Please indicate the degree of finalisation of the output (100% - finalised; 0% - not yet started).

If appropriate, attach to your Report **one copy of the prototypes / interim versions of the outputs** (book, CD-ROMs, conference/seminar/workshop programme, etc.).

<b>Summary table of outputs: Materials, publications, modules, courses, conferences, seminars, workshops, reports, studies etc.</b>				
<b>N°</b>	<b>Type of Output</b>	<b>Title (if applicable)</b>	<b>% of realisation</b>	<b>Comments</b>
1	Online Database	BENPHE European database on non profit and philanthropy academic programs	80%	To published in two phases: November 2007 and June 2008

### Part 3 - Declaration of Expenditure (in €)

This section sets out the financial information required by the Agency.

Table 3.1 provides a summary of the Costs of the project

Table 3.2 shows the distribution of these costs between the partners

**Table 3.1 Summary of Expenditure to date**

	<b>Approved budget (1)</b>	<b>Paid expenditure (2)</b>	<b>% of approved budget (3)</b>	<b>Foreseen expenditure (4)</b>	<b>Total foreseen expenditure (5)</b>
<b>1. Staff Costs</b>	46.000,00	29.387,39	63,89	16.612,61	46.000,00
<b>2. Direct Costs</b>					
2.1 Transatlantic student mobility stipends					
2.2 Travel and subsistence	21.000,00	8.730,89	41,58	12.269,11	21.000,00
2.3 Equipment and materials					
2.4 Subcontracting, consultancy (including ECTS) and other external services					
2.5 Other costs					
<b>Subtotal for Direct Costs</b>	21.000,00	8.730,89	41,58	12.269,11	21.000,00
<b>3. General Costs</b>	4.000,00	2.668,28	66,71	1.331,72	4.000,00
<b>TOTAL</b>	<b>71.000,00</b>	<b>40.786,56</b>	<b>57,45</b>	<b>30.213,44</b>	<b>71.000,00</b>

(1) As indicated in the Agreement (taking into account any approved amendments)

(2) Expenditure from the beginning of the eligibility period to the submission date of the report. The figures have to be equal to the totals in table 3.2.

(3) =  $2/1 * 100$

(4) Estimated expenditure to be committed during the remaining eligibility period

(5) = 2+4

**Table 3.2 Breakdown of actual expenditure to date within the partnership (1)**

	Partner 1 UNIBO	Partner 2 BROOKES	Partner 3 ESH	Partner 4 ALMA LAUREA	
Name of partner					Total (2)
<b>1. Staff Costs</b>	12.230,00	5.670,00	5.945,78	5.541,61	<b>29.387,39</b>
<b>2. Direct Costs</b>					
2.1 Transatlantic student mobility stipends					
2.2 Travel and subsistence	4032,04	1.966,38	1.882,82	849,65	<b>8.730,89</b>
2.3 Equipment and materials					
2.4 Subcontracting, consultancy and other external services					
2.5 Other costs					
<b>Subtotal for Direct Costs</b>	4032,04	1966,38	1882,82	849,65	<b>8730,89</b>
<b>3. General Costs</b>	2668,28	0	0	0	<b>2.668,28</b>
<b>Total</b>					<b>40.786,56</b>

- (1) Expenditure from the beginning of the eligibility period to the submission date of the report.  
(2) Totals have to be equal to the figures given in column "Paid expenditure" in Table 3.1