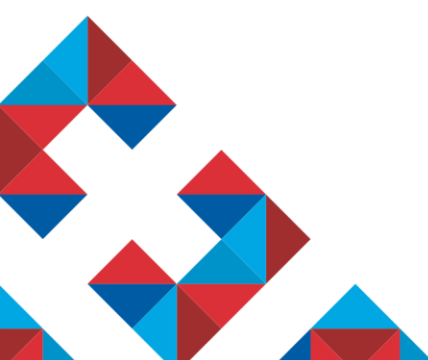


# 2018 Erasmus+ KA1 VET and Adult Education Handbook

## Part 2: Project and Financial Management

Version 1.0



## Overview of changes to the handbook

This document is version 1.0 of the Project and Financial Management guidance for KA1 VET and Adult Education beneficiaries, which is part two of the KA1 VET and Adult Education Handbook. If future versions of this document are created, the table below will record an overview of changes made compared to previous versions:

<b>Page number in previous version</b>	<b>Change</b>	<b>Page number in this version</b>

By using this Handbook, you accept this disclaimer in full. This Handbook has been produced solely for supporting UK beneficiaries manage Key Action 1 Vocational Education and Training (VET) and Adult Education projects under the 2018 Call and no other reason and therefore should not be relied upon by any third party. The contents of this Handbook is not advice and should not be treated as such. Neither the United Kingdom National Authority function for the Erasmus+ programme (the “National Authority”) nor the United Kingdom National Agency function for the Erasmus + Programme (the “National Agency”) nor any person acting on their behalf may be held responsible for the use which may be made of this Handbook and any information contained in this Handbook. The National Authority and the National Agency have not verified, nor do they make any representations or assurances as to, the quality, nature of, efficacy or otherwise of this Handbook or as to the accuracy, completeness or adequacy of any information contained in this Handbook. Should you wish to use the materials in this Handbook, you agree to acknowledge that the materials were originally developed by the National Agency for the UK Erasmus + programme.

# Contents

Overview of changes to the handbook .....	1
Managing your Project .....	5
Quality Assurance .....	5
Roles and Responsibilities .....	6
Mobility Tool+ .....	8
Evaluation .....	8
Impact .....	10
Creating Impact .....	10
Measuring Impact .....	11
Dissemination.....	12
Erasmus+ Project Results Platform (EPRP) .....	13
EPALE .....	14
Erasmus+ Emblem .....	14
Managing your Mobilities .....	16
Health and Safety.....	16
Risk Assessments.....	16
Safeguarding.....	16
Insurance .....	16
Linguistic Preparation and OLS.....	17
Online Linguistic Support (OLS).....	18
Recognition of Learning Outcomes .....	20
Europass .....	20
Language Recognition .....	20
European Credit System for Vocational Education and Training (ECVET) .....	20
Continuous Professional Development (CPD) .....	21
Participant Withdrawals.....	21
Financial Management of your Grant.....	22
Financial Management Systems and Audit Requirements.....	23
Organisational Support.....	24
Travel.....	24

Individual Support .....	25
Course Fees .....	27
Linguistic Support.....	28
Special Needs Support.....	28
Exceptional Costs .....	29
Eligibility of Costs .....	29
Subcontracting .....	30
Managing Changes.....	32
Budget Transfers.....	32
‘Force Majeure’ Clause .....	33
Changes not covered by the Grant Agreement.....	34
Monitoring Activities.....	35
Project Monitoring .....	37
Monitoring Partners .....	37
Monitoring Participants .....	38
UK NA Monitoring .....	39
Monitoring Calls and Emails .....	39
Project Visits.....	39
Monitoring Visits .....	40
On the Spot Checks.....	40
Systems Checks.....	41
Audit Visits.....	41
Reporting .....	42
Participant Reports.....	42
Beneficiary Reports.....	42
Interim Report(s).....	43
Final Reports .....	44
Final Report Content.....	44
Final Report Assessment.....	45
Payment of your Grant.....	47
Glossary .....	49

## Introduction

The 2018 Key Action 1 (KA1) Handbook for Adult Education and Vocational Education and Training (VET) beneficiaries is a guide to help accredited and non-accredited UK beneficiaries with the management of their 2018 KA1 projects. **This guidance is only intended for UK beneficiaries and the UK National Agency (NA) is not accountable for this information being used by other countries.**

The Handbook provides **practical guidance on the various stages of the project lifecycle** and should be used as a reference point for all common project queries. Please note that, while we have tried to cover all main areas of the project lifecycle and provide help on typical queries and issues, the guidance is not exhaustive. It is important to note that this guidance is supplementary to your Grant Agreement and its annexes, which should always be referred to first when checking contractual requirements. In case of conflicting information, the Grant Agreement prevails. **We also recommend that you continue to refer to the 2018 Erasmus+ Programme Guide during project implementation to ensure you are managing your grant in accordance with programme rules.**

The 2018 Erasmus+ KA1 VET and Adult Education Handbook is comprised of three parts that can be downloaded from the '[manage your grant](#)' section of the Erasmus+ website:

- Part 1: Introduction to Erasmus+ and KA1 VET and Adult Education
- Part 2: Project and Financial Management
- Part 3: Resource Pack

This document is the Project and Financial Management guidance, which covers specific information relating to the KA1 VET and Adult Education project lifecycle in addition to the management of your project and its budget. It is intended to help you manage your project and ensure project activities are eligible and supported by the appropriate evidence. **Please note, for details of specific activities approved for your project please refer to your application and Grant Agreement.**

Please note that this document may be subject to change throughout the course of the programme. Changes will be recorded on page 1 of this document, and the most recent version will be found on our [website](#).

**Remember, if you have any queries or issues that you cannot find answers to within the guidance, your Project Officer at the UK NA is on hand to help!**

## Managing your Project

A great deal of work goes into the management of a KA1 project, depending on your organisation there may be different staff and departments that need to work together. There are a number of aspects, which could be considered core processes or tasks within a KA1 project, such as:

- Project management;
- Partner management;
- Promotion;
- Placement planning;
- Selection of participants;
- Preparation;
- Monitoring;
- Recognition of learning;
- Reporting.

Your project activities will fall into three main phases, project preparation, project delivery and project evaluation/dissemination. You will need to prepare for your project by setting up appropriate project and financial management systems. This might include having a project timeline or Gantt chart, setting up spreadsheets to record expenditure, setting up a filing system to store hardcopy evidence for the project as a whole and for individual participants, and meeting with staff that will work on the project. Having robust systems in place to manage and deliver your project is very important and the UK NA will expect to see evidence of these during any checks or audits on your project.

A key part of your project is the delivery of the mobilities. This covers everything from the recruitment and selection of participants to the completion of participant reports after mobilities have finished and keeping your budget in Mobility Tool+ up-to-date.

Finally, you will need to make sure you have strategies in place to evaluate and disseminate your project. It is important to make sure that your project has an impact beyond your partners and participants. Identifying the best channels and audiences to engage with will help you effectively disseminate your project.

## Quality Assurance

The UK NA strives to ensure that only the highest quality applications are funded and work hard to provide as much help and support as possible to beneficiaries throughout the project lifetime. However, it is the responsibility of beneficiaries to ensure the quality of the planned mobilities.

Annex V/VI.V, within all VET Grant Agreements, defines the quality commitment to training placements. This annex is based on the [European Quality Charter for Mobility](#), which has been approved by the European Parliament as a reference document for individuals planning, providing, or undertaking mobilities abroad. You should therefore ensure that these principles are adhered to during the ongoing management and implementation of your project and placements.

Following the assessment and selection process, all successful applicants are assigned a dedicated Project Officer within the UK NA. During the course of your project, you may be asked to provide key project milestones with clear dates. **This information should be as accurate as possible as your Project Officer will use this to help monitor your project.** You should make sure that you keep in regular contact with your Project Officer so the UK NA is able to provide ongoing help and guidance to help ensure that your project is of the highest quality.

The UK NA provides guidance documents to help beneficiaries guarantee the quality of placements; these are available in the '[Manage your grant](#)' section of the Erasmus+ UK website.

To ensure all parties involved in your project are committed to ensuring high quality mobilities, **all roles and responsibilities need to be clearly agreed and outlined in contracts or partnership agreements.**

You should ensure you have a strong and committed partnership in place before starting your project, and in order to implement a high quality project you should consider the following areas:

- Clear management systems and processes with appropriate staff;
- Fair, transparent, and inclusive recruitment and selection;
- Placement content that meets participants' needs and project objectives;
- Preparing participants before mobility;
- Supporting participants during and after mobility;
- Clear and appropriate monitoring arrangements;
- Strategies to manage evaluation, impact, and dissemination.

## Roles and Responsibilities

Participating organisations will take on different responsibilities and tasks within the project depending on their role. Each project is made up of a unique partnership so it may be that some responsibilities are shared out differently, some examples of areas of responsibility include:

## Beneficiary

- Define the placement objectives and competencies that participants will develop
- Select participants on the basis of clearly defined and transparent selection criteria
- Prepare participants for the practical, professional and cultural aspects of the placement
- Establish a contract which includes a training/learning agreement that is clear and transparent for all parties involved
- Manage the transport, accommodation, visa/work permit arrangements, social security cover and insurance
- Evaluate each participant's personal and professional development
- Update Mobility Tool+ on a regular basis

## Sending and Receiving Organisations

- Negotiate a tailor-made training programme for each participant
- Agree the monitoring and mentoring arrangements
- Implement agreed procedures to ensure recognition of skills and competencies acquired
- Establish appropriate communication channels for all parties including participants.
- Evaluate progress

## Receiving Organisations

- Foster an understanding of the culture and mentality of the receiving country
- Assign tasks and responsibilities to the participants that match their knowledge, skills, competencies and training objectives and ensure that appropriate equipment and support is available
- Identify a tutor to monitor the participant's progress
- Guarantee appropriate work insurance cover for each participant

Certain types of organisations are **not permitted to receive participants**:

- European institutions (defined by the Commission as “social partners at Community level, European employers’ and trade union federations in specific sectors, as well as bodies and organisations with a European status or scope”).
- Organisations that manage Community programmes.
- UK national organisations (e.g. embassies, consulates, cultural institutes, regional and national representations).

The role and responsibilities of the **participant** is to:

- Comply with all arrangements negotiated for their placement and do their best to make the placement a success.



- Abide by the rules and regulations of the receiving organisation, including the normal working hours, code of conduct and rules of confidentiality.
- Communicate with the receiving organisation about any problems or changes regarding the placement.
- Complete and submit an evaluation questionnaire in the specified format, together with any supporting documentation, at the end of the placement.

**Keep in regular contact with your Project Officer** so that the UK NA is able to provide on-going help and guidance to ensure that your project is of the highest quality.

## Mobility Tool+

**Mobility Tool+** is the online management and reporting system all Erasmus+ beneficiaries must use to manage their KA1 project. This must be used to record participants and placement information as well as to monitor your budget expenditure, manage participant reports and to create and submit your Final Report to the UK NA. During the project, at least once a month, you should input and update new information regarding your participants and their mobility activities.

**It is important that Mobility Tool+ is kept up to date at all stages of your project life cycle** and that the information is accurate. This is particularly important, as Mobility Tool+ will automatically send out participant reports to all participants for them to complete at the end of their mobilities using the information entered on the tool.

For further information please refer to the European Commission's user guide which is available on the Mobility Tool+ homepage. The UK NA has also produced an [Erasmus+ UK IT tools Webinar](#) which you can watch to familiarise yourself with how to use the system.

**Input and update any new project information regarding the participants and the mobility activities to Mobility Tool+ at least once a month.**

## Evaluation

Evaluation is a key process within your KA1 project as it allows you to measure to what extent you have met the projects aims and identify where improvements can be made. You should **evaluate the performance of the project throughout its lifecycle and as soon as the project has finished** in order to guarantee an accurate recall of events.

You should have a strategy in place to help you plan, record, and follow-up your evaluation activities. You might want to consider the following areas when developing the evaluation strategy for your project.



The following hints and tips should be of help with your evaluation strategy:

- Involve all parties who had a role in the project, such as the participants, the receiving organisations, and any national consortium partners;
- Circulate the results of the final evaluation to appropriate personnel and senior management, in order to increase dissemination and impact at an organisational level;
- Identify the key improvements that need to be made in subsequent funding applications. The assessors of any future KA1 Mobility application would expect to see that the results of your past evaluations have been taken into account in the planning of that project;
- In the final report to the UK NA, explain how the different forms of evaluations received have led to changes in the project and training provision. If no changes have been made, give an explanation;
- Remember to evaluate each area of the project lifecycle, from the quality of your preparatory activities right through to your dissemination techniques.

Alongside your own evaluation processes, all participants in your mobility activities (excluding accompanying persons) must submit a participant report via Mobility Tool+. This is another way for you to evaluate the project and any impact on the individuals. This is also an important **contractual requirement** as you need to ensure 100% of your participants have submitted the online questionnaire. Failure to submit all participant reports may result in a reduction to the Final Grant amount.

## Impact

The Erasmus+ Programme Guide defines impact as **“the effect that the activity carried out and its results have on people, practices, organisations and systems”**. In order to be considered as best practice and to support high quality within your project, you should place a focus on impact at all levels throughout the project lifecycle.

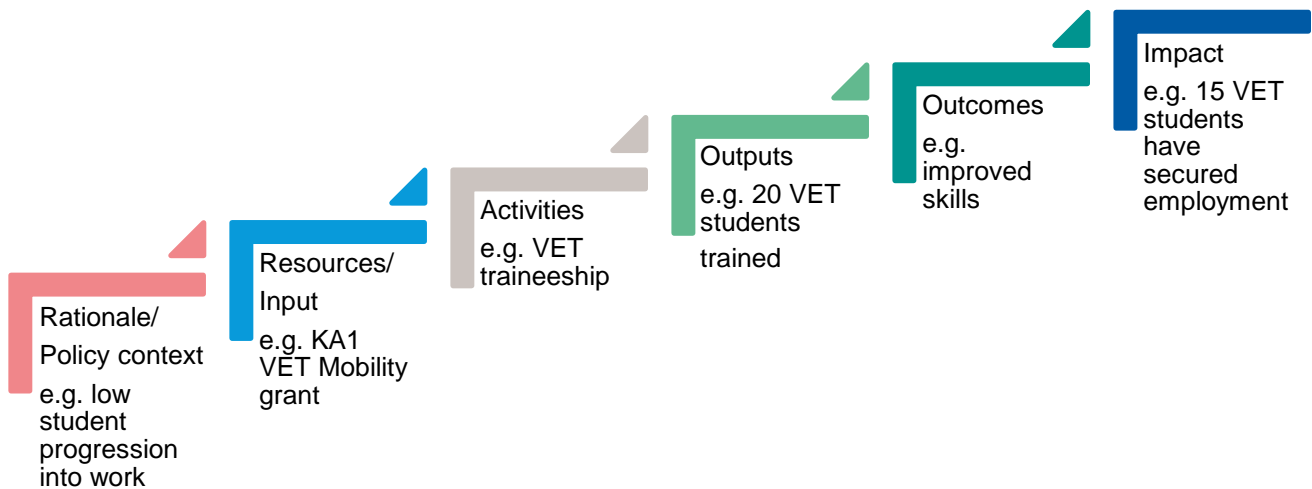
It is anticipated that making an impact is what has driven your organisation to apply for KA1 funding, as you wish to improve training practices and provisions in your area, region and the partner organisations’ localities. Impact is a very important area as it is one of the key areas in which the UK NA will assess your project. As a result, it is imperative that you are clear from the start what impacts you want to achieve within your project and set up relevant mechanisms to measure these impacts.

The UK NA will ask for information about your project’s impact during UK NA monitoring activities, in Interim Reports (where applicable) and in the Final Report. Whilst detailed guidance will be provided before you submit your reports, you should understand that the impact on participants and on the participating organisations is one of the three key assessment areas of your project.

**Don’t wait for your Project Officer to ask about the impact of your project during regular UK NA monitoring activities.** Give them a call or email them to let them know about your project successes! They might even put your project forward for a case study.

## Creating Impact

The model on the following page demonstrates how you can create impact and provides examples to illustrate each step of the process. This model begins with identifying the rationale for project activities, that is, the needs of your participants and any other relevant stakeholders. This rationale establishes a baseline from which progress can be measured. You should then make sure that all the project activities and results fit well with your rationale.



## Measuring Impact

Here are some practical suggestions to evaluate the outcomes and impacts of your projects:

- Use an **evaluation form** that participants can complete to evaluate different aspects of the mobility as well as the impact it has had on them. Ask participants to complete forms **at different stages of the project**, so they can better measure the developments and differences. For instance, they can fill in forms before, during and after their mobility, as long as the evaluation form contain the same type of questions in order to allow you to draw comparisons;
- If you have a small number of participants you could also **interview them** at different stages;
- **Don't just involve your participants**, but also involves others who work with them, e.g. line managers and end users. For example, if you are sending teaching staff abroad you could get their learners to complete evaluations of the teaching they receive before and after the mobility. You could also ask another member of staff to observe the training that is delivered before and after the mobility activity;
- For short mobility periods, give participants **daily diaries**, which ask how the activities undertaken have had an impact on their needs and met the aims they have set for themselves. Be clear with your participants that these diaries are not a private account and that they will be shared. A common format would help with this;

- Explore some **innovative evaluation tools** such as Blobtree. This tool uses a simple cartoon image of non-specific characters and asks you to consider which character you most identify with. It could be suitable if you are trying to elicit views from participants who may not be comfortable expressing themselves verbally;
- Use any **existing KPIs** within your department or organisation and link them to your project;
- Don't be shy of engaging with **your partners** and ensure that you capture any impacts on them such as an increased capacity to co-operate at European/international levels;
- Although within KA1 projects the immediate impact is likely to be on the participants, do not forget to capture the **full impact** the project has had or will have on other stakeholders and your organisation, as well as on people at all levels of the project including partners and yourself as project manager.

It is important to effectively report on the impact of your project within your project reports. To prepare for this you should check your application to remind yourself of the project's expected impact, and the methods you planned to use in order to create and capture impact. At the Final Report stage you will be expected to report as a minimum on your planned impacts and actions, but feel free to add to your original plans with information such as any unexpected impacts.

You should avoid copying and pasting the information included in the application form into your Final Report. Your report should contain meaningful detail about what impacts were actually achieved, whether targets were met and, if not, why.

The UK NA understands that the timeframe for submitting your Final Report may not allow you to identify impacts in the medium-term and long-term however you can detail how you intend to evaluate this in the future.

## Dissemination

Dissemination is the process of communicating project **results, successes, outcomes and impacts** as widely as possible. You should aim to implement the dissemination plan outlined in your application form, while continually building on this. An effective plan encompasses why, what, how, when, to whom and where.

Dissemination activities should be considered throughout the project lifecycle, including during and after the funding period, and it should link into your evaluation strategy. Dissemination should consist

of both **tangible** outcomes and **intangible** outcomes, such as skills and personal experiences that both project organisers and participants have acquired.

Tangible Results	Intangible Results
<ul style="list-style-type: none"> <li>▪ An approach or a model to solve a problem</li> <li>▪ A practical tool or product, such as handbooks, curricula, e-learning tools</li> <li>▪ Research reports or studies</li> <li>▪ Good practice guides or case studies</li> <li>▪ Evaluation reports</li> <li>▪ Recognition certificates</li> <li>▪ Newsletters or information leaflets</li> </ul>	<ul style="list-style-type: none"> <li>▪ Knowledge and experience gained by participants, learners or staff</li> <li>▪ Increased skills or achievements</li> <li>▪ Improved cultural awareness</li> <li>▪ Better language skills</li> <li>▪ Future employment of learners</li> </ul>

Dissemination is an integral part of all Erasmus+ funded projects and should raise awareness about your project, as well as highlight the outcomes of the project. Participants, beneficiary organisations and receiving organisations should all be involved with dissemination activities. **For projects involving staff, it is particularly important that participants individually disseminate their findings across both formal and informal networks** following the completion of their work placement. Good practice and lessons learnt should be implemented within participants' own organisations and through wider local, regional, national and/or European networks.

Projects which have good results on a participant level and on a wider scale may be used as case studies and featured as an [Erasmus+ story](#) on our website and in other media, which is another way of disseminating outcomes and impacts that the project has had on the participants, organisation and wider community. If possible, it would be beneficial to not only send written information, but also photographic evidence and/or videos of the participants on placement. You can read and watch inspiring Erasmus+ examples from organisations and participants as well as read testimonials from students who took part in the predecessor programmes [on our website](#).

We have produced a press pack to help you promote your project outside your organisation. To download the press pack or for further information on promotion and dissemination, go to: <https://www.erasmusplus.org.uk/promotion-and-dissemination>.

## Erasmus+ Project Results Platform (EPRP)

The [Erasmus+ Project Results Platform \(EPRP\)](#) is a web-based dissemination platform, which offers a comprehensive overview of all funded projects and highlights good practice examples and success

stories. The EPRP is a useful tool in disseminating the outcomes of your project and makes available any tangible resources, products, deliverables and outputs which have resulted from projects funded under Erasmus+, as well as a selection of projects funded under the previous programmes. The platform is a potential source of information and serves as a project database and a community of practice for projects.

The summary of your project, submitted in your application, is **automatically published** on the platform, and you are encouraged to update the platform with your project outcomes and results where relevant during the lifetime of your project. The platform gives more visibility and exposure to particularly high-performing projects, making it a useful tool to find new partners or projects which interest you. You should review your contact details regularly and ensure these are kept up to date. For further information and support go to: <http://ec.europa.eu/programmes/erasmus-plus/projects/eplus-help/faq.html>.

## EPALE

The ePlatform for Adult Learning in Europe (EPALE) is a **multilingual open membership community** funded by the European Commission. Aimed at those with a professional role in adult learning across Europe, the platform invites members to exchange news, views, ideas and resources with others throughout Europe.

Once registered on the platform, members can access resources, upload blog articles, news items and events, comment on the latest information, join in discussions and search for partners for potential pan-European projects or to share ideas. Building networks and sharing ideas are an essential part of dissemination and such platforms should be exploited. The EPALE platform can be accessed at: <http://ec.europa.eu/epale/en>.

## Erasmus+ Emblem

Whether you are directly responsible for the management of your project or promoting the funding opportunities available, you are required to use the European Commission's Erasmus+ emblem and associated wording for any project outputs and promotional materials produced, and to publicly acknowledge the support received from the European Union, which includes events, conferences and seminars.

When **acknowledging the support received**, there are a range of ways to display the emblem such as those shown below:



With the support of the  
Erasmus+ programme of  
the European Union



**Co-funded by the Erasmus+  
programme of the European Union**

**Promoters of the Erasmus+ programme** should refer to the name of the programme in their communication without using an emblem. If you think that a graphic is necessary, then the EU emblem can be used alongside the name of the programme.



Downloadable templates and full branding guidelines for Erasmus+ projects in the UK are available on [our website](#) as well as a [guide to using the EU emblem](#).



# Managing your Mobilities

## Health and Safety

Ensuring that participants are working in a safe and healthy environment is not just a contractual requirement of running a mobility placement, it ensures the participant has a good experience at their placement. **It is essential that you cover all aspects of participant's health and safety from the start of the project and throughout the participant's placement period.** The UK NA recommends that you follow your organisation's health and safety procedures and that you are fully aware of the health and safety procedures within the receiving organisation. **Ensure as well that the personal data of your participants is safely processed, in line with the the General Data Protection Regulation.**

## Risk Assessments

Risk assessments should be completed on receiving organisations, accommodation, travel arrangements and any other areas you deem appropriate. **A good risk assessment will help avoid incidents and aid the smooth running of the project.** The UK NA recommends that you follow the risk assessment procedures used within your organisation. Further information on risk management and how to conduct a risk assessment can be found on the [UK government's Health and Safety website](#).

## Safeguarding

Safeguarding can refer to either a person or mechanisms in place to ensure protection against danger, damage, injury, etc. **Particularly when working with young people and/or vulnerable people it is important that you have safeguarding policies in place.** This may mean that you have accompanying persons (who have been vetted as appropriate) to travel with young persons or vulnerable participants. Further information about safeguarding can be found on the [UK government's Disclosure and Barring Service](#).

## Insurance

Organisations participating in Erasmus+ must have effective procedures and arrangements in place to promote and guarantee the safety and protection of the project participants. Under the Erasmus+ programme, all participants, including staff, must be insured against the risks linked to their involvement in mobility activities. The programme does not define a unique format of insurance, nor

does it recommend specific insurance companies. It is your responsibility to obtain appropriate insurance relevant to the type of project carried out and to ensure the policy is available at a national level. Furthermore, it is not necessary to subscribe to a project-specific insurance, if participants are already covered by existing insurance policies of the project organisers.

As a minimum, the following areas must be covered:

- **Travel Insurance**, including damage or loss of luggage;
- **Third Party Liability**, including professional indemnity or insurance for responsibility;
- **Accident and Serious Illness**, including permanent or temporary incapacity;
- **Death**, including repatriation in case of projects carried out abroad.

You should also establish whether the host organisation has Liability Insurance, which covers participants in the workplace for the duration of their placement, whether they are at work or not. It is the responsibility of the sending organisation to check that this is in place and the European Commission is not liable for any damage caused by a participant or beneficiary ([Annex I - General Conditions Article II.4.1](#)).

**Levels of Liability Insurance coverage and Accident Insurance coverage can vary across different countries, you are advised to check this beforehand.**

All participants qualifying under national legislation should apply for the [European Health Insurance Card \(EHIC\)](#), which entitles the holder to reduced costs and/or free healthcare in most European countries. However, the coverage of the European Health Insurance Card or private insurance may not be sufficient, especially in case of repatriation and specific medical intervention. In that case, a complementary private insurance might be useful. It is the responsibility of the sending institution of the student to ensure that the participant is aware of health insurance arrangements.

## Linguistic Preparation and OLS

You must ensure you provide linguistic preparation to your participants as outlined in your application and this needs to be **relevant and appropriate to the staff course or vocational area as well as proportional to the length of placement**.

For KA1 VET participants undertaking mobilities of less than 19 days (short-term mobility) and all KA1 Adult Education participants, linguistic preparation is financed from the "Organisational Support" budget.

The [European Commission's website for languages](#) provides support for language learning and linguistic diversity, with information and links to tools, portals and databases such as the [European Language Label database](#) for innovative projects in language teaching and learning.

All VET participant mobilities of less than 19 days	• linguistic preparation financed from the organisational budget heading
All Adult Education participant mobilities	• linguistic preparation financed from the organisational budget heading
VET learner mobilities of more than 19 days	• linguistic preparation through OLS or linguistic support budget heading

## Online Linguistic Support (OLS)

The **Online Linguistic Support (OLS)** tool is an online platform designed to support language learning for long-term VET Learners by offering them the opportunity to assess their skills in a foreign language and, for selected participants, by providing an online language course to follow and improve their competence.

**Linguistic support funding** for long term VET Learners who will be working or studying in languages, which the OLS doesn't currently offer, must be requested within the application and could, for example, finance a language tutor for your learners.

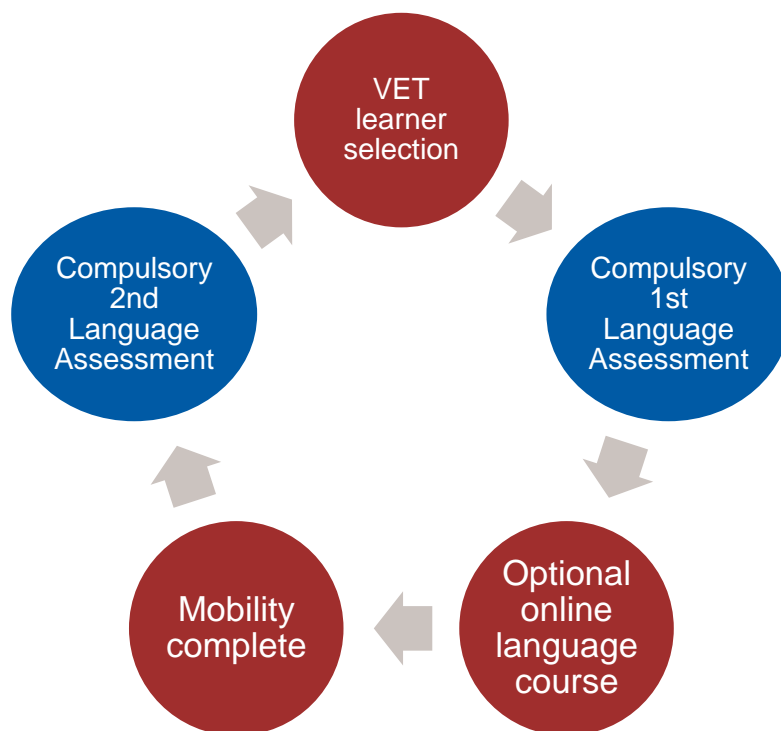
If linguistic support funding or OLS access was requested in your application then your Grant Agreement will confirm the amounts of linguistic support and/or the numbers of OLS access licenses, which your project has been granted. If the UK NA has additional OLS access licenses then it may offer OLS access to eligible organisations who did not request them within their application.

For projects granted OLS access, there are three criteria's that define who the OLS is for and who will be given access to it:

- The OLS service is for VET learners of **long-term mobility activities i.e. mobilities from 19 days to 12 months.**
- The OLS has expanded and currently has course assessments for 18 languages: **Bulgarian, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Italian, Irish, Latvian, Lithuanian, Maltese, Polish, Portuguese, Romanian, Slovak, Slovenian, Spanish, and Swedish.**

- Language courses are available at **all levels** for **Dutch, English, French, German, Italian,** and **Spanish**. Language courses up to **B2 level** are available for **Portuguese**. Language courses up to A2 level are available for **Czech**. Language courses at **A1 level** are available for **Bulgarian, Croatian, Danish, Estonian, Greek, Finnish, Hungarian, Latvian, Lithuanian, Polish, Romanian, Slovak, Slovenian** and **Swedish**. Courses for more languages are likely to be developed in the future. Except for native speakers, participants using these languages as their **main language of instruction, work or volunteering** can be supported through the online service.

The OLS consists of mandatory language assessments, which take place before and at the end of the mobility. An optional online language course can be followed in between the two language assessments.



If you have been granted OLS licenses the UK NA will arrange the necessary OLS access requirements for the assigned OLS contact person **provided in your application**. You will be allocated the number of assessment and course licenses detailed in your Grant Agreement by the UK NA. You will then be responsible for allocating these OLS access licenses to your participants, allowing them to complete language assessments or courses.

Further OLS information will be sent directly to projects with OLS access. Further guidance can also be found [on our website](#).

## Recognition of Learning Outcomes

It is important that all placements are either formally or informally validated. It is best practice to accredit the time spent on placement through a course of study, but less formal methods are also acceptable such as certificates of achievement issued by the beneficiary or receiving organisations.

### Europass

The UK NA recommends that all projects use [Europass](#) to validate the participants time on placement. Europass is a European wide initiative that aims to help individuals present and document their skills and qualifications in a clear and transparent way throughout Europe. Europass consists of five documents, which enables potential employers to understand which subject(s) have been studied, what training has been completed and how much experience has been gained.

### Language Recognition

The portfolio of Europass documents includes the [Europass Language Passport](#), which provides a way of validating the skills gained on placement as well as adding information about other language training (either formal or informal) an individual may have received.

## European Credit System for Vocational Education and Training (ECVET)

You may also be in a position to implement elements of [ECVET](#) within your project. **ECVET is a European credit system designed for Vocational Education and Training in Europe**. The system is a technical framework which supports the transfer, recognition and accumulation of learning outcomes with a view to achieving a full or partial qualification. ECVET comprises a series of actions and tools that facilitate the process of learning recognition, irrespective of the country or system in which the learning actually took place. You may be able to address elements of ECVET within your project if you plan to engage in any of the following:

- Produce a **Memorandum of Understanding** with your partner(s), which covers the assessment and validation of placements.
- Implement **Learning Agreements**, which detail the learning duration and expected learner outcomes as well as how these will be achieved, and how they will be assessed, validated and recognized.
- Work with your partners to decide what work undertaken by participants on placement will count as a unit or credit of learning.

- Assess the learning that takes place during a placement.
- Plan for learners to have a personal transcript detailing the activities and achievements from their placement.

**ECVET contributes to making recognised mobility an integrated part of individuals' learning pathways.** Quality-assured and well-documented learning means learners are better positioned to present acquired skills to employers. Formal recognition of learning acquired during a mobility period abroad improves the credibility of an international education and training experience.

In addition, Erasmus+ supports other EU transparency and recognition tools where relevant – in particular the [European Qualifications Framework \(EQF\)](#), the [European Credit Transfer and Accumulation System \(ECTS\)](#), the [European Quality Assurance Reference Framework \(EQAVET\)](#) and [European Quality Assurance Register \(EQAR\)](#). A common purpose of these tools is to ensure that skills and qualifications can be more easily recognised, within and across national borders, in all sub-systems of education and training as well as in the labour market. For links to more information on European recognition tools please see the [European Commission's Recognition of Skills and Qualifications](#) webpage.

## Continuous Professional Development (CPD)

For staff mobilities, it is recommended that placements are validated as part of their Continuous Professional Development (CPD) plan within their home organisation. Further articles, events and resource links are available through the website of the [adult learning community EPALE](#) by [searching 'CPD' in the Search area](#).

## Participant Withdrawals

It is important to ensure that you take all necessary steps to prevent participant withdrawals pre-placement or mid-placement. This includes:

- **Managing expectations** to ensure that your participants know exactly what is expected of them whilst on placement.
- Providing partners and receiving organisations with **clear information** regarding your participants, the proposed activities and intended outcomes.
- Implementing **good quality selection plans**, to ensure that you have involved the correct participants. The information you provide to participants from the outset of the programme, may influence their expectations. It would be good practice to conduct interviews as part of the recruitment process, to determine what participants want to achieve from their placement.

- **Preparing participants** thoroughly for their placement linguistically, culturally and practically.

Where the minimum duration has been completed, the UK NA may be able to reimburse costs for the completed days of the mobility. Should the minimum duration not be met, the UK NA will cover none of the costs associated with these participants and you should seek to make a claim through your insurance policy, in the first instance. If a participant decides of their own accord to leave their placement early, without a valid reason, you must follow the terms outlined in their participant agreement to attempt to recover any spent funds.

Only in exceptional circumstances, will the UK NA recognise the cause of withdrawal as **force majeure** and consider reimbursement of costs attributed to the withdrawal of participants. In all cases of participant withdrawal, you must contact your Project Officer at the UK NA to see if it is possible to submit a claim under one or more of the cost components within your grant agreement i.e. Organisational Support, Individual Support, Linguistic Support and/or Travel. If so, you must clearly explain in writing the reasons for the withdrawal. Your claim will be assessed by the UK NA who will determine whether it is justified based on the following:

- Whether there is a genuine reason for the withdrawal;
- Whether you took reasonable steps to maintain the participant's involvement in the project;
- Whether you have exhausted all avenues to recover costs against the appropriate project insurance policies; and
- Whether the costs are genuinely non-refundable (i.e. pre-booked accommodation).

Your Project Officer will notify you of the UK NA's decision, and any next steps. If you are unable to demonstrate that reasonable steps were taken to avoid withdrawal, the UK NA reserves the right to request repayment of the corresponding part of the grant.

**In all instances you should try to recover costs attributed to the withdrawal of participants through the applicable insurance policies.** Evidence of being unable to claim costs against any insurance policies will need to be submitted to the UK NA.

## Financial Management of your Grant

Your Erasmus+ grant is regarded as a contribution to your project costs, and is not intended to cover the total cost of running your project. Grants are awarded on a **per participant basis** under the following budget headings:

- Organisational Support

- Linguistic Support (VET learners only)
- Travel
- Individual Support
- Course Fees (Adult Education only)
- Special Needs Support (where applicable)
- Exceptional Costs (where applicable)

Throughout the project lifecycle you must ensure you have clear financial reporting mechanisms in place to manage your Erasmus+ grant. Evidence for all budget headings should be kept in case of an **audit** and you will be required to manage and report on your project finances via Mobility Tool+. You will not need to demonstrate the actual costs spent during your project except for Special Needs Support and Exceptional Costs, which are based on the actual expenditure, and Individual Support, which must be spent in full on each participant according to unit costs.

When you submit your Final Report you may be asked to submit evidence to demonstrate that the placement actually took place. In order to do this, you will need to submit a **declaration of attendance** from the receiving organisation containing the following information:

- Full name of the participant (which must match Mobility Tool+)
- Purpose of the activity abroad
- Placement start date (not including travel days)
- Placement end date (not including travel days)
- Course title (adult education only, if applicable)
- Signed in original by the receiving organisation
- Include the Erasmus+ logo
- Receiving organisation letterhead or logo, where available

The UK NA has developed a template declaration of attendance, which you can find in Part 3 of the Handbook.

## Financial Management Systems and Audit Requirements

It is a requirement that you set up an appropriate accounting system, which identifies all sources of funding, and expenditure relating to the project incurred during the duration of the Grant Agreement. The European Commission may request an external audit or wish to arrange a random inspection of project accounts after the project has been completed. **You are therefore required to keep all original documents relating to the implementation and financial management of the project for a period of five years, or for up to three years for grants not exceeding €60,000**, after the final



payment has been made. These documents are expected to be kept your organisations registered legal address. However, if your project is subject to checks and audits after the final payment or there are ongoing appeals and litigations, which last longer than the periods specified above, you must keep project-related documents until these processes have been closed.

## Organisational Support

These funds form a contribution to any costs directly linked to the organisation, management and implementation of your KA1 project; excluding Travel and Individual Support for participants. Organisational support can be used to cover costs related to:

- The selection and preparation (pedagogical, intercultural and linguistic) of participants,
- Monitoring and supporting participants during the mobility,
- Validating learning outcomes,
- Support provided by accompanying persons.

Organisational Support is provided for both learners and staff. You also have the option, through agreements with your partners, **to share the Organisational Support funds awarded with those organisations that actually bear the costs**. Organisational Support will only be awarded for those participants who undertook an eligible mobility abroad and you will need to provide evidence at the Final Report stage demonstrating that the placement occurred. The following unit costs are applicable:

Number of Participants	Grant Awarded
1 to 100	€350 per participant
More than 100	€200 per participant

## Travel

Travel is based on the distance travelled per participant and is defined as the cost of the **entire journey** from the UK point of origin to the receiving destination; including transfers and luggage costs. Travel is calculated according to the following rates, but will be automatically calculated for you on Mobility Tool+.

Travel Distance	Amount (for travel costs from place of origin to the venue of the activity and return)
Between 10 and 99 KM:	20 EUR per participant

Between 100 and 499 KM:	180 EUR per participant
Between 500 and 1999 KM:	275 EUR per participant
Between 2000 and 2999 KM:	360 EUR per participant
Between 3000 and 3999 KM:	530 EUR per participant
Between 4000 and 7999 KM:	820 EUR per participant
8000 KM or more:	1300 EUR per participant

You must report **the place of origin and the place of the mobility** venue on Mobility Tool+ for each mobility activity that took place. The ‘place of origin’ is the place where the beneficiary organisation is located in the UK and the ‘venue’ is the place where the receiving organisation is located. If a different place of origin or venue is reported, you need to give the reason for this difference in Mobility Tool+.

**You need to provide an explanation for each participant within Mobility Tool+ if they travel to or from a different location than the ‘place of origin’, for example from a different college campus.**

It is important to note that travel bands will be verified at the Final Report stage, and if you have incorrectly selected a higher travel band this will be reduced and reflected in your final payment. You can check the correct travel band is being used by using the [European Commission’s Distance Calculator](#).

## Individual Support

Individual Support is defined as the **day-to-day costs** incurred by participants during the activity. This element of the budget is intended to help cover the costs of accommodation, insurance, food as well as local travel to and from the placement in the receiving country. Individual Support may be used by participants to cover any costs they incur whilst on mobility including cultural activities or for ‘pocket money’.

Individual Support is calculated on a **unit cost** basis and is payable according to the country of destination and the duration of the placement. **The full Individual Support amount must be spent on the participants.**

**Each participant must receive the full amount of Individual Support they are entitled to according to the European Commission’s unit costs. Individual Support entitlements must be**

included in each participant's grant agreement and may be checked by the UK NA alongside evidence of actual Individual Support expenditure.

You must report the start and end dates of the mobility on Mobility Tool+ for each mobility activity that was awarded funding for 'Individual Support'. The Mobility Tool+ will calculate the amount for Individual Support based on the following unit cost rates. You can also indicate if you had a travel day on one or both sides of the mobility in which case you will receive Individual Support for those days as well.

Individual Support will only be awarded for participants who undertook an eligible mobility period.

The following tables show the unit costs per day in Euro for the different mobility activities:

Receiving Country	Learner Mobility (maximum allowance per day per participant)		Staff Mobility (maximum allowance per day per participant)	
	Days 1 – 14	Day 15 – 12 Months	Days 1 – 14	Day 15 – 2 Months
Denmark, Finland, Iceland, Ireland, Liechtenstein, Luxembourg, Norway, Sweden, United Kingdom	€120	€84	€180	€126
Austria, Belgium, Cyprus, France, Germany, Greece, Italy, Spain, Netherlands, Malta, Portugal	€104	€73	€160	€112
Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia, the former Yugoslav Republic of Macedonia, Turkey	€88	€62	€140	€98

When making payments to participants, you may do this in the form of a bank transfer, pre-paid payment cards or if this is not possible, in cash. Participants must receive 100% of the Individual

Support funding awarded to them and this can be done in one or a combination of the following two ways.

You can either:

- Transfer the allowances for Travel, Individual Support, Linguistic Support and Course Fees in full to participants so that they can make their own arrangements; **or**
- Make suitable arrangements on behalf of the participants in order to ensure appropriate travel, subsistence and linguistic support is given.

The UK NA strongly recommends that your records account for expenditure of Individual Support on an individual participant basis. Where you are incurring costs on behalf of the participant, any of the remaining Individual Support funds should be transferred to the participant.

**You must retain evidence of Individual Support payments to participants in all instances.**

This may be in the form of invoices for payments made directly to the supplier or in the form of signed receipts/bank transfers by the participant. During UK NA checks, the UK NA will require this evidence to be provided to identify if there has been any underspend of the unit cost. **Failure to demonstrate that each participant has received the full unit cost they are entitled to will result in the UK NA identifying ineligible costs which may lead to a partial or full recovery of your grant.**

The practice of pooling all subsistence costs for participants and distributing an average total is **not eligible** under the Erasmus+ programme. Participants must receive the full amount calculated for their placement activity. If cash payments are made to participants, you are required to obtain **signed receipts** from the individuals concerned. For longer-term placements, you should pay individual support allowances directly into participants' bank accounts in **instalments** and keep appropriate evidence of this expenditure.

The UK NA has developed a template for you to record a breakdown of Individual Support expenditure for each participant, which can be found in Part 3 of the Handbook.

## Course Fees

For **Adult Education** projects that involve participants enrolled onto a course for which a fee has to be paid, a unit cost of **€70 per day** is granted per participant, with a maximum of €700 per participant, regardless of how many courses they attended during the project. In order to include course fees funding, you should input the number of course days in the "**Course Fees No. Days**" field on Mobility Tool+, which will calculate the grant amount based on this unit cost. Reporting on the course days separately allows for instances where the duration of a mobility activity (as calculated based on the

start and end dates you input) is different from the duration of the course, for example if the mobility lasts over a weekend but the course only takes place on weekdays. Only the actual days which the course takes place should be reported in the above field as these are the only days which can be considered for course fees funding.

Annex III of your Grant Agreement details what documents you will need to provide to evidence Course Fees.

## Linguistic Support

For projects with **VET learners**, for languages not covered by the OLS, Linguistic Support can be claimed for mobilities lasting at least 19 days and consists of a unit cost of **€150 per participant**. Linguistic Support can only be given to participants who undertook language preparation in the language required for their mobility. You should use Mobility Tool+ to report whether or not language preparation was given to each participant using linguistic support funding. The Mobility Tool+ will calculate the grant amounts for linguistic support based on the unit cost.

The documents you will need to provide to evidence Linguistic Support depend on how the support was delivered. For example, whether you arranged for an external language tutor, purchased materials for participants, or delivered training internal. To make sure that you have the appropriate evidence, you should refer to Annex III of your Grant Agreement.

You can also find more information on the OLS and the language assessment on its dedicated [website](#).

## Special Needs Support

Where costs have been incurred for participant(s) with a disability or other specific needs, you will need to report actual costs in Mobility Tool+. In order to be able to edit the “Special Needs Support” fields you will need to tick the box named “**Participant with Special Needs**” next to the participant’s name. Within the “EU Special Needs Support Comments” box you will need to indicate whether you have been granted this funding as part of your Grant Agreement with the UK NA or if the funding has become available as a result of a budget transfer. You will also need to detail the type and total cost being claimed. If your project is selected for a UK NA check you may be required to provide the following (this is not an exhaustive list):

- **Copies of invoices** of the actual costs incurred, giving the name and address of the company issuing the invoice, as well as the amount, currency and date;
- **Evidence of payment**; and
- Any **other relevant documentary evidence**, such as proof of special needs or disability.

## Exceptional Costs

Exceptional Costs refer to any costs incurred to provide a financial guarantee to the UK NA, to cover expensive travel costs of participants where the travel grant unit cost does not cover 70% of the travel costs, or to directly support the participation of learners with **fewer opportunities** (VET mobility projects only). In order to claim Exceptional Costs, you should report the cost(s) incurred in Mobility Tool+ within the relevant mobility and comment on what the money was spent on in the “**Overall comments**” box. At the Final Report stage, you will be required to provide the following:

- For costs related to participants with fewer opportunities: copies of invoices of the actual costs incurred, giving the name and address of the company issuing the invoice, as well as the amount, currency and date;
- For expensive travel costs for participants: proof of payment of the related costs on the basis of invoices specifying the name and address of the body issuing the invoice, the amount and currency, the date of the invoice and the travel route.. Up to 80% of the actual costs can be claimed at Final Report, i.e. if the total travel costs were €1,000, the maximum amount of eligible funding that could be requested would be €800.

As per **Annex III** of your Grant Agreement, you need to be able to provide electronic copies of the above supporting documents at the Final Report stage. You are recommended to upload scanned copies as annexes to your report.

## Eligibility of Costs

Throughout your project, you need to ensure that the costs you incur are in line with the budget approved by the UK NA, as shown in Annex II of your Grant Agreement. If you wish to make changes to your budget during the project lifetime, please double-check which procedure you need to follow: (a) the rules for budget transfers set out in the Art. 1.3.3 of your Grant Agreement, or (b) submitting a contract amendment request to your Project Officer at the UK NA. This will ensure that costs incurred are eligible on the basis of your revised budget.

The Grant Agreement and the 2018 Erasmus+ Programme Guide provide key information regarding the eligibility of costs. The following table points you to the direction of key sections within these documents that you should review.

Topic	Location of relevant information in the grant agreement	Location of relevant information in the 2018 Programme Guide
<b>Eligibility of costs incurred under budget headings based on unit contributions</b>	Annex III, Art. I.2 General Conditions, II.19.1	p. 251, “Eligible costs”
<b>Eligibility of costs incurred under budget headings based on reimbursement of actual costs</b>	Annex III, Art. II.2 General Conditions, II.19.1	p. 251, “Eligible costs”
<b>Eligibility of project activities</b>	Annex III, part III	VET: p. 50 – 51 VMC: p.54 AE:p.69
<b>Eligibility of Value Added Tax (VAT)</b>	General Conditions, Art. II.19.4	p. 251, “Value Added Tax”
<b>Ineligible costs</b>	General Conditions, Art. II.19.4	p. 251 - 252, “Ineligible Costs”

Please note that VAT only relates to costs incurred under budget headings based on reimbursement of actual costs, i.e. Special Needs and Exceptional Costs. Please also note that indirect costs cannot be claimed under KA1 VET and Adult Education projects.

**Please do not hesitate to contact your Project Officer at the UK NA if you have any questions concerning your project budget, especially if you are considering a budget transfer.**

## Subcontracting

**Your organisation and staff** are expected to undertake the project management and implementation of your Erasmus+ project. These **core tasks cannot be sub-contracted** as outlined in Article II.10 of the General Conditions contained in Annex I of your Grant Agreement.

Under Article II.11, the General Conditions outline the additional conditions, which need to be followed if you do find that you want to subcontract tasks forming part of the project and should be read before entering in to any subcontracting arrangements. Page 259 of the 2018 E+ Programme Guide also provides information on sub-contracting and the award of procurement contracts.

If someone directly employed by the applicant organisation, sending organisation or intermediary partner within a national mobility consortium, is not managing your project then the UK NA will consider them a sub-contractor and therefore the applicant organisation must comply with the relevant articles in order for their activities to be viewed as eligible.

Furthermore, **activities that a sub-contracted organisation or individual can deliver in the project is also limited to non-core project activities.**

**Payments for contributions in kind from third parties are not eligible under the financial rules of the programme.** For example, any work carried out on your behalf to support submitting an application cannot be paid for by any part of the grant from your successful application.



## Managing Changes

Your 2018 KA1 project has been assessed and approved by the UK NA based on the information you provided in your original grant application. To ensure equal treatment of applicants, it is important that the project you deliver deviates as little as possible from the assessed application. However, we understand that sometimes, despite the best intentions, changes happen. **Your Grant Agreement covers some changes whilst others you must request from the UK NA who will assess and inform you if the change can be implemented.**

**There is no guarantee that the UK NA can approve a change to your project** so it is very important to speak to your Project Officer as soon as you identify any potential changes.

## Budget Transfers

Within your KA1 project, you are able to transfer certain elements of your grant between the different budget headings without submitting a formal contract amendment request to the UK NA for approval. Budget transfers offer flexibility to increase mobility numbers or give favour to certain types of mobility activities and Special Needs Support; **these transfers to and from different budget categories are percentage-based and as the beneficiary, you will be responsible for calculating the maximum transferable amount.**

Article I.3.3 of your Grant Agreement details the types of budget transfers that you are able to do that do not require a formal amendment of your Grant Agreement. Generally, this allows you to transfer between budget headings that are both based on unit costs or from a budget heading based on unit costs to one based on actual costs. As a rule you cannot transfer from a budget heading based on actual costs to one based on unit costs. **Each type of budget heading also has fixed limits based on a percentage of the overall amount for the budget heading in question.** The following tables highlight the budget transfers which are allowable:

Budget Category/Activity type	Budget transfers permitted
Organisational support	0% - This budget category cannot be increased
	100% can be transferred into Travel and/or individual support for VET

	learners, VET/AE staff/accompanying persons
	20% can be transferred into the budget for Advanced Planning Visit activities
<b>VET Staff mobility (Travel, Individual Support budget)</b>	Can be increased by 20% across Travel and Individual Support
	Funds can be transferred into VET learner budget (No limit)
<b>VET ErasmusPro activities (Organisational Support, Travel, Individual Support and Advanced Planning Visit)</b>	Can be increased by 20% over all budget categories (N.B. The Organisational Support budget may only be increased with the addition of participants on ErasmusPro mobilities)
<b>VET Short-term learner mobility</b>	Any limit to increase of funds into this activity budget
<b>AE staff mobility (travel, individual support, course fees)</b>	Up to 50% can be transferred between these travel, individual support and course fee budget categories.
<b>Exceptional Costs</b>	No funds can be transferred out of this budget (VET only)
	Any increase is permitted.
<b>Special Needs</b>	No funds can be transferred out of this budget (VET only)
	Any increase is permitted.

## 'Force Majeure' clause

We are aware that, due to Coronavirus, project activity may have been postponed or cancelled. Project activities arranged before the UK lockdown that were adversely affected by Coronavirus may be deemed to be a force majeure, and any project costs incurred that cannot be

recovered may be covered by your Erasmus+ Grant Agreement subject to the approval of the UK National Agency.

We appreciate Coronavirus remains active and it is therefore difficult to progress with your project with any degree of certainty.

To incur project costs at this uncertain stage of Coronavirus may no longer be deemed to be force majeure and may not be covered by your Erasmus+ Grant Agreement.

Therefore before booking travel, accommodation or any other activities in relation to your project, you are strongly advised to check the relevant government guidance and support channels e.g. <https://www.gov.uk/coronavirus> and to review and accept all risks attached to advanced bookings.

You must ensure the health and safety of your participants remains at the forefront of all decisions you take, together with the ability of your organisation to cover any costs incurred should placements not proceed as planned.

## Changes not covered by the Grant Agreement

If you need to make a change that is not covered by the Grant Agreements budget transfers you can make a request to the UK NA by contacting your Project Officer, who will provide you with the correct form to complete and return to the UK NA, electronically.

Changes such as updating your contact details or bank details will be a minor change that will only require you to notify the UK NA with the new information. **It is important to inform the UK NA of these minor changes, so that we are able to contact you with pertinent information and for example, so any payments are not delayed.**

However, some changes are seen as significant and as having the potential to call into question the original application assessment decision. In these cases, you would need to submit a detailed justification about the change and the impact it would have on the project. For significant changes, the UK NA will undertake an assessment of the information you provide in conjunction with your initial application and its assessment. **You should also bear in mind that there is no guarantee that the UK NA will be able to approve your request** so it is very important that you stay in touch with your Project Officer during your project especially at the first sign of any potential changes resulting in an amendment. Any requested changes will be assessed against the approved application and the focus of the specific project. This means that an amendment could be approved for one project but not for

a different one. **Previous approval does not set a precedent for future requests.** However, all projects are permitted to request the same changes.

**The NA has 45 days to consider any contract amendments.** The UK NA must receive any request for amendment at least one month before the intended implementation of the change(s) in order to allow sufficient time for approval.

The UK NA is unable to process a significant amendment request during the last month of project activity in accordance with European Commission guidance, therefore you should ensure that your project is on track and no changes need to be made in advance of this.

You should not action any changes until you have received written confirmation from the UK NA (**verbal agreements are not binding by either party**). For minor changes, the UK NA will provide written approval by formal letter. For significant changes, a supplementary pages of your Grant Agreement will be issued to you that will need to be signed in the same way as your original Grant Agreement. Should you proceed with these changes before receiving authorisation to do so, the UK NA has the right to request repayment of the corresponding part of your grant.

## Monitoring Activities

Monitoring falls on both the UK NA and yourself as the beneficiary. You will be accountable to the UK NA for the implementation of the project, the use of funding awarded and for the Individual Support amounts paid to participants.

**Your role for monitoring is also detailed within your Grant Agreement beginning in Article I.4 and running throughout the Grant Agreement and annexes.**

As the UK NA, we monitor to see that your project and your activities are firstly compliant and secondly eligible, in line with your Grant Agreement. This covers the activities of your project, the financial management of your project as well as your project partners and participants.



Your Grant Agreement details what you need to have in place regarding the level of monitoring and support in order to ensure the safekeeping of your participants and also help you to understand the expectations that we have of you as the beneficiary.

## Project Monitoring

When it comes to monitoring your project, you will need to ensure that it is progressing in line with your application. Has anything changed, or are you experiencing any issues that may mean your project will not go exactly as planned in your application? Sometimes the dates mentioned for key milestones within your project have not proven practical as anticipated. This can happen from time to time but is this going to negatively impact the next phase of your project?

As the coordinating organisation, your role in monitoring also includes ensuring that you are compliant with your Grant Agreement and application and are adhering to the roles and responsibilities that you set out in your application and agreed with your project partners.

For example, one element of the project to monitor is the selection of participants, have you ensured that the application and selection criteria have been clear and transparent? If so, how? You can write about this in your Final Report. Other areas include the practical management of your project, the organisation of travel, insurances, visa applications, and mentoring and support.

You will need to monitor your project finances too and make sure you are familiar with the various budget transfers that you can and cannot do. It may be easier to see your project as a project with mini projects, each mobility being a mini project. All funds for participants (Individual Support, Travel, Linguistic Support) must be spent on or given to the participants. This leaves Organisational Support funding available to you as the coordinator to aid with the costs of implementing the mobilities.

## Monitoring Partners

Where monitoring your project partners is concerned, you need to ensure that they are adhering to the rules of the programme in terms of eligible activities. Your project partners will need to work with you to ensure that participants are supported and safe whilst they are on their mobility. They will also need to work with you to ensure that mobility activities are carried out as planned and eligible.

It is good practice to set up agreements before activities begin. Agreements should include roles and responsibilities and provide details on payments including timings for payments. The UK NA

may request to see evidence of partner agreements, especially if you planned to use them in your application.

It is important to ensure that your partner(s) are clear on their roles and responsibilities within the project and that you have agreed the activities that they will deliver.

It may also be a good idea to arrange monthly catch-ups with your project partners and more frequent conversations during periods when mobilities are taking place.

It is the responsibility of you and your partner(s) to negotiate a training programme for your participants and it is important that these are tailored for each individual participant's needs. You should also ensure that expectations are clear where monitoring and mentoring arrangements are concerned. You will need to work together to establish Learning Agreements which will also require working with the participants. It is also important to discuss evaluation.

You may want to agree a timeline with your partner to agree deadlines for tasks to be completed so that you can monitor your partner(s) and your own tasks effectively.

## Monitoring Participants

The monitoring of participants concerns supporting them and where possible involving them in the project, for example, when forming Learning Agreements or Staff Mobility Agreements (templates for these are included with your Grant Agreement and are compulsory for VET Learners and Staff). You will need to ensure that participants are supported throughout their mobility, pre-, during and post-mobility.

**You may want to set up a Facebook or WhatsApp group to invite mobility participants to join.** This way you can monitor them more closely and offer support and advice easily.

You will need to have a Grant Agreement with all participants and work with them to ensure they understand the requirements outlined within the agreement. Templates for these are included with your Grant Agreement and are compulsory for all participants. You will also need to ensure that participants are aware that they are required to complete a participant report after their mobility, which should provide as much feedback about their experience as possible.

You may want to bring participants together after their mobilities to support them when completing their participant reports. **It is your responsibility to ensure 100% of participants are submitted to the UK NA.**

Insurance and placement activities will need to be organised beforehand, and you will need to ensure that participants are aware of arrangements, and what to do if their placement does not go to plan or they need help if something goes wrong, whilst they are on placement.

## UK NA Monitoring

The UK NA will also undertake monitoring on your project. All KA1 projects will be monitored by the UK NA through Mobility Tool+ on a monthly basis. If you do not update your project on a regular basis, your Project Officer will be in contact to find out why. Your project may also be selected for other types of monitoring. Selection for other types of monitoring may either be as a result of a random selection or because the UK NA has identified a need for additional support or potential risks.

## Monitoring Calls and Emails

A sample of projects are chosen every year to participate in quarterly monitoring calls or to provide quarterly emails about the progress of their project. If your project is selected, **your Project Officer will get in touch and schedule these calls with you or request email updates throughout the lifetime of your project.** Monitoring calls/emails are a great way for us to get to know you better, find out more about your project and get to know the kinds of problems our beneficiaries face when implementing their projects.

## Project Visits

The UK NA is required by the European Commission to undertake audits and monitoring visits to a representative sample of organisations each year to ensure that their management of their KA1 project is satisfactory and within the terms of the Grant Agreement.

If you are selected for a project visit, the UK NA will contact you by email to inform you about the nature of the check and schedule a date for the visit. For some of the visits listed below there will only be a short period of time between notification of the visit and when the visit **must** take place. Therefore, you should ensure your project files are kept accurate and up-to-date at all times.

**At the end of a visit, you will receive a feedback report and the opportunity to provide further information if it was not available at the time.** We will give you formal feedback in the form of a draft visit report, taking into account any initial comments from yourself, within 30 days of the visit. You will have 30 days within which to respond to the draft report during which time the UK NA may accept missing information or other explanations as necessary. The final version of the report will



then be sent to you with any changes accepted by the UK NA following the submission of additional information or evidence.

## Monitoring Visits

The UK NA may visit your organisation during the project's lifetime. The visit is an opportunity for you to take stock of the project achievements and review your progress against project objectives.

Key areas for discussion are:

- Project management, progress, and implementation;
- Your project partnership;
- Recruitment and selection of participants;
- Project evaluation, impact, and dissemination activities; and
- Financial management.

The visit also provides an opportunity for the UK NA to gain a greater understanding of your project and **to review whether the project is meeting the needs of other stakeholders and the participants**. You should ensure that a participant is available for a short interview with UK NA representatives and any partners/stakeholders where applicable.

UK NA representatives will assess that you can deliver your **project to the specifications detailed in your application form, your Grant Agreement and to the requirements of the Erasmus+ programme ensuring that your activities are eligible and compliant**.

Monitoring visits will explore examples of good practice that you have developed, which other projects might benefit from. Information gathered during the visit will feed into our work in monitoring the progress of the programme in the UK as a whole and will be used to inform reports produced for the UK National Authority for the programme as well as for the European Commission.

## On the Spot Checks

A random sample of monitoring visits will also include or take the form of a standalone 'on-the-spot' financial check to provide assurance on the actuality and eligibility of project activities. On-the-spot checks verify that the amounts claimed for individual mobilities in relation to the Grant Agreement are supported adequately by the documentation held by your organisation.

It is a compulsory requirement for beneficiaries to retain evidence of Individual Support payments to beneficiaries in all instances. **This may be in the form of invoices for payments made directly by the beneficiary or in the form of signed receipts/bank transfers by/to the participant.** During on-the-spot checks, the UK NA will need this evidence to be provided. You will be required to identify if there has been any underspend within the unit cost on a per participant basis.

Organisations subject to an on-the-spot check are either chosen at random or due to a risk assessment, using a methodology specified by the European Commission. **Typically, an on-the-spot check lasts between 1 and 2 hours, and you will be notified if you have been chosen.**

## Systems Checks

A percentage of projects will be chosen for a Systems Check. **Generally, systems checks will be conducted with recurrent beneficiaries and top receivers with a particular focus on VET Mobility Charter holders.**

System checks consist of two distinct phases. The first will be an in-depth check of organisational procedures and systems set up to manage Erasmus+ projects; for example, we would expect to see evidence of the Individual Support transferred to participants. This check will also have a strong focus on the overall mechanisms and procedures put in place to run the projects.

The second phase is an on-the-spot check of the most recently finalised project. Original documents will need to be available and we would request that all relevant people working on the Erasmus+ project be present during these checks so that all questions or queries can be resolved on the day.

## Audit Visits

Audit visits may be undertaken by the European Commission, the European Court of Auditors, the UK NA's own Internal Audit and/or Compliance Teams, and other relevant bodies. You should be aware that the European Commission and the European Court of Auditors operate on a short timescale and may request a visit at very short notice.

**The European Commission and the European Court of Auditors have their own method of planning visits and the UK NA is only informed of the organisations they intend to visit when announced.**

The UK NA may identify organisations for ad hoc visits based on the amounts of funding awarded, issues arising from previous reports or other information received from the beneficiary.

Additional quality checks covering the commitments covered with the Grant Agreement will be undertaken. These will include review of feedback reports from individual students and staff.

## Reporting

All KA1 projects include the submission of participant reports and a final beneficiary report after the project has ended. You may also need to submit progress or interim reports, depending on the payment structure for your project. Your Grant Agreement includes information on the reporting and payment structure for your project and the deadlines for submission.

**Submitting reports to the UK NA is a contractual requirement of your project.** Failure to submit reports may result in your project being suspended or terminated and a recovery of your grant.

## Participant Reports

Once a mobility has finished, Mobility Tool+ will automatically send a participant report to each participant to complete, therefore it is important to keep the Mobility Tool+ up-to-date with ongoing activities and mobility details. **It is a contractual requirement that you ensure 100% of Participant Reports are completed and submitted via Mobility Tool+.** Participants should complete reports as soon as possible upon return from their mobility.

To ensure all participant reports are submitted, it is a good idea to schedule a mandatory event for participants to complete their reports together soon after the end of the mobility.

The automatic email from Mobility Tool+ providing the link to the participant report will state, “Do not reply” in the title and may go to participant’s spam folders. It is important to advise your participants of this to ensure that they do not delete this email. If participants do delete the email, you can resend them the link to their participant report via Mobility Tool+. The link will be sent overnight by Mobility Tool+, so the participant should wait 24 hours for the new link to be received.

More information about the content of the participant reports is available in Part 3 of the Handbook along with links to download sample versions which you may wish to look at and share with participants in advance so they know what to expect. **Please note, however, that participant reports must be completed by participants once received by email through Mobility Tool+.**

## Beneficiary Reports

Depending on the payment structure for your project, you will need to submit different types of beneficiary reports to the UK NA. If you have received 80% of your awarded grant as a first pre-financing payment, you will only need to submit a Final Report. If you have a payment structure with more than one pre-financing payment, you will need to submit an Interim Report and possibly a Progress Report.

If you need to submit a Progress or Interim Report, your Project Officer will be in touch with additional guidance and the forms you need to submit closer to the end of the reporting period in your Grant Agreement.

## Interim Report(s)

Some beneficiaries will be required to complete one or more Interim Report(s) during the project lifecycle, as detailed in Article I.4.3 of the Grant Agreement. **For beneficiaries on a reduced payment structure, an Interim Report will need to be submitted in order to request the next pre-financing instalment of your grant.**

The report asks you to provide a comprehensive overview of how the project has been implemented and to provide budget information detailing how the grant has been spent to date, including evidence where applicable. The Interim Report and supporting documentation must be complemented by up to date records in Mobility Tool+, which show that mobilities have been complete and the associated costs incurred. The UK NA will compare the amounts entered in your Interim Report against Mobility Tool+ to determine whether mobilities have already taken place and whether the budgets match.

The report is in a Word document format that will be sent to you by the UK NA to complete two months before it is due. However, the European Commission is currently planning to integrate this into the Mobility Tool+, so be aware that you may be asked to complete and submit this in the same way as your Final Report via the Mobility Tool+.

If the report is a request for a pre-financing payment and the required conditions have been **(i.e. at least 70% of the previous pre-financing payment has been incurred or the amount specified in article I.4.3 of your Grant Agreement)** then the UK NA will make the applicable pre-financing payment due within 60 days of receiving the report. If you have not reached the expenditure threshold to trigger a payment by the submission deadline of your report, you will still be required to submit an Interim Report detailing your project's progress. You will then need to submit an additional Interim Report to the UK NA once the required spend has been achieved. It is therefore important to include details of all project expenditure in your report to avoid delays.

## Final Reports

All beneficiaries are required to submit a Final Report within 60 days following the end of their contracted project end date as specified in Article I.4.3 of the Grant Agreement. The period for the balance payment can therefore only start after the end of the project date. **Your Final Report must not be submitted prior to the end of the project's contracted end date** as specified in Article I.2.2. of your Grant Agreement. Although the main activities, such as mobility placements, may be completed in advance of the project end date, other activities are included in your project, such as the full evaluation of activities and dissemination, which are expected to take place until the end of your project's contracted period. Failure to carry out these other activities in full, up to the contracted end date of your project, will lead to early submission of your report to be treated as a termination of the project. It may also result in the quality assessment of your Final Report being poorly and/or partially implemented, which could result in a reduction to the final grant amount, as detailed below and in Annex III of your Grant Agreement.

The Final Report must be submitted using Mobility Tool+ and the UK NA will notify you when this report is due and provide comprehensive guidance in good time for you to complete and submit by the deadline date.

## Final Report Content

Your Final Report will be made up of a qualitative and financial section, which will be used to assess the extent to which your project was completed in line with your initial application. Once the UK NA has assessed your report, you will receive a feedback form along with the final grant instalment, where applicable.

The Final Report has 10 sections, which are outlined below:

1. **Context:** this section is automatically pre-filled, providing general information about your project (organisation name, project title, project duration, etc.);
2. **Project Summary:** this section asks you to provide a summary of your project upon completion;
3. **Summary of Participating Organisations** this section is a prefilled table showing the project's participating organisations;
4. **Implementation of the Project:** this section asks you to describe the contribution of participating organisations and asks you to give information about how original objectives were met;

5. **Project Management:** in this section you will need to describe how activities were organised and implemented, the assessment of project results and preparation of participants;
6. **Activities:** An overview of mobility flows will be prefilled in a table and you can explain any changes to planned activities at application stage; the background and profile of participants, with an explanation of how these participants were selected. There is also a prefilled summary of participant feedback;
7. **Learning Outcomes and Impact:** in this section, you should describe the competencies gained by participants involved in the project and the recognition received by them. The impact on participants, organisation and stakeholder involved should also be provided;
8. **Dissemination:** the dissemination undertaken and to which target groups should be detailed in this section;
9. **Budget Summary:** a summary of your project budget is automatically input here (taken from the information entered into Mobility Tool+).
10. **Closing remarks:** this section you may include any feedback to the European Commission here; and

## Final Report Assessment

The Final Report will be assessed on the basis of quality criteria and scored out of a maximum total of 100 points. If the Final Report scores less than 50 points in total, the UK NA will reduce the final grant amount on the basis of poor, partial or late implementation of the project even if all activities reported were eligible and actually took place. **Your report should therefore be detailed and provide examples of best practice and achievements** where possible, and explain any issues experienced and how you tried to overcome them to meet the original aims and objectives of the project.

The Final Report will be assessed in conjunction with the reports from mobility participants, using a common set of quality criteria focusing on:

- The extent to which the action was implemented in line with the approved grant application;
- The quality of the learning outcomes and impact on participants;
- The impact on the participating organisations;
- The quality of the practical arrangements provided in support of the mobility, in terms of preparation, monitoring and support to participants during their mobility activity;
- The quality arrangements for the recognition/validation of the learning outcomes of participants; and

- The extent to which the grant amounts due to mobility participants were transferred to them in accordance with the contractual provisions set out in the agreement between the beneficiary and the participant following information in Annex IV of your grant agreement.

In accordance with Annex III of your Grant Agreement, your final grant amount will be subject to reductions for poor, partial or late implementation of the project, which will be applied to the final grant amount for organisational support and will be of:

- 25% if the final report scores between 41 and 50 points both included;
- 50% if the final report scores between 26 and 40 points both included;
- 75% if the final report scores between 0 and 25 points both included.

Poor, partial or late implementation of the project reductions may also be established, by the UK NA, where less than 100% of participants reports, from individual participants taking part in the mobility activities, have been completed. **It is a contractual requirement for 100% of participants to complete and submit a questionnaire via Mobility Tool+.**

## Payment of your Grant

Each project will have a different payment structure, based on the result of the organisation’s financial capacity check. A typical payment structure will be as follows:

	<b>First payment</b>	<b>Second payment</b>	<b>Final payment</b>
<b>Amount</b>	70% of total grant amount	N/A	Up to 30% of total grant amount and on the approval of the final report

Organisations that have weaker financial capacity, poor liquidity, poor track record in terms of repayment of refunds, late reporting, loss of financial documents and/or loss of travel evidence may be subject to a different payment structure at the discretion of the UK NA.

You will be notified of your payment structure upon receipt of your grant agreement, details of which will be contained within the Special Conditions.

Where applicable, the first pre-financing payment will be made automatically no later than 30 days after both the UK NA and the beneficiary have signed the contract. Any final balance payments will be made no later than 60 days after the submission of a satisfactory Final Report and any associated documentation to the UK NA. If the UK NA needs to request additional information or documents to complete the assessment of your report, this timeframe is suspended as per article II.24.2 of your Grant Agreement.

Please note that the UK NA will make all grant payments in Euros. You must ensure that your bank account can receive the funds in Euros. The UK NA is not responsible for any delay caused because of bank accounts’ inability to receive such payment(s).

It is advised to set up a Euro bank account as costs incurred as a result of exchange rates or bank transfers will not be covered by the UK NA or your Erasmus+ grant. **You must ensure that your bank account can receive the funds in Euros.**

If your payment structure is subject to additional pre-financing payment(s) you will be required to submit additional Interim Reports to the UK NA by the date specified within Article I.4 of your Grant Agreement. Additional pre-financing payments will be made no later than 60 days after submission of a satisfactory report and only if you can show that you have spent, at least 70% of your previous pre-



financing payment incurred or the amount specified in article I.4.3 of your Grant Agreement. You will need to evidence that the required amount has been spent, by demonstrating through Mobility Tool+ that mobilities have actually taken place. The budget section will automatically be updated when participants complete mobilities, but the Organisational Support budget will need to manually be updated. If the required level of funding has not been spent, your next pre-financing payment will be made once it has following the submission of another report. You will be required to agree a resubmission date with your Project Officer in line with when you think the required funds will have been spent. Your Project Officer at the UK NA will be able to advise you of the appropriate steps in this situation.

## Glossary

This glossary covers all parts of the Handbook and so some of the terms included may not be used in this part.

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### **Accompanying Person**

Within a KA1 VET or Adult Education Mobility project, this person accompanies participants on placement, either to support participants with special needs or to ensure the protection, safety and effective learning of VET learners. Such individuals are eligible for financial support under the programme. Accompanying persons are not regarded as participants.

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### **Beneficiary**

Within a KA1 VET or Adult Education Mobility project, this is any organisation that has accepted the NA's offer of funding after its project application was selected. By signing the grant agreement, the beneficiary assumes overall responsibility for carrying out the project. In an national mobility consortium, all UK partners are referred to as beneficiaries and the applicant organisation is the coordinator.

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### **Continuing Vocational Education and Training (CVET)**

Vocational education or training after initial education and training or after entry into working life. CVET is aimed at helping individuals to improve or update their knowledge and skills, to acquire new skills for a career move or retraining, and to continue their personal or professional development<sup>1</sup>.

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### **Coordinator**

The applicant organisation for a national mobility consortium. The coordinator will sign the Grant Agreement on behalf of the whole consortium and acts as liaison with the UK NA.

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### **Dissemination**

This involves spreading the word about the project successes and outcomes as far as possible. Making others aware of the project will impact on other organisations in the future and will contribute to raising the profile of the organisation carrying out the project. To effectively disseminate results, an appropriate process at the beginning of the project needs to be designed.

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<sup>1</sup> Adapted from Cedefop, Terminology of European Education and Training Policy, Publications Office of the European Union, Luxembourg, 2014.

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## **Erasmus+ programme**

The European Union's programme to support education, training, youth and sport in Europe. The programme runs from 2014 to and 2020 and offers a range of funding opportunities for UK organisations actively involved in delivering activities in the above fields.

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## **Erasmus+ Project Results Platform (EPRP)**

A dissemination platform produced for Erasmus+ offering an overview of projects funded under the programme and highlighting best practices.

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## **EU Survey**

The online platform through which participant questionnaires are submitted.

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## **Flow**

A group of participants undertaking the same type of mobility activity (e.g. staff training abroad) to the same receiving country and for the same duration. The Mobility Tool+ automatically groups mobilities sharing these characteristics into flows when feeding information regarding mobilities into the Final Report.

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## **Grant Agreement**

A legally binding contract issued by the UK National Agency (NA) to the beneficiary that defines the roles and responsibilities of both parties. This also covers the contractual budget and evidence requirements.

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## **Initial Vocational Education and Training (IVET)**

Vocational education and training carried out in the initial education system, usually before entering working life. Initial education and training can be carried out at any level in vocational education (full-time school-based or alternance training) or apprenticeship pathways<sup>2</sup>.

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## **Intermediary Organisation**

This is a partner in a national mobility consortium but is not a sending organisation. Its role may be to share and facilitate the administrative procedures of the sending VET organisations and to better match apprentice/student profiles with the needs of enterprises in case of traineeships and to jointly prepare participants.

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<sup>2</sup> Adapted from Cedefop, Terminology of European Education and Training Policy, Publications Office of the European Union, Luxembourg, 2014.

**Key Action 1 (KA1)**

The Mobility strand of Erasmus+ which involves sending staff, learners, youth workers and young people to other participating countries to undertake activities such as work experience, job shadowing, training and teaching.

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**Learner**

Within a KA1 VET Mobility project, this is an apprentice or a VET student (full time or part time) whose studies typically include work-based learning. A recent graduate of a VET school or a company (i.e. a former apprentice) is also classed as a learner providing they complete their mobility activity within one year of graduating or completing their apprenticeship.

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**Legal Representative**

A person authorised within a participating organisation to enter into legally binding agreements on behalf of their organisation.

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**Mobility activity**

The period of time a participant spends within the receiving organisation carrying out a traineeship, a teaching/training assignment or staff training. This is also referred to as 'mobility', for example within the Mobility Tool+. The mobility activity may include cultural activities and linguistic preparation while in the receiving country, however there are set durations for the main learning/training activities as follows:

for VET learner traineeships: two weeks i.e. 10 working days to 12 months, excluding travel time;

for staff mobility: two days (consecutive) to two months, excluding travel time.

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**Mobility Tool+**

The online management and reporting tool for Erasmus+ beneficiaries.

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**Mono beneficiary grant agreement**

This is the contract signed between the UK NA and the organisation that has been awarded Erasmus+ funding as sole applicant and beneficiary of the grant.

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**Multi beneficiary grant agreement**

This is the contract signed between the UK NA and the organisations that have been awarded Erasmus+ funding as part of a national mobility consortium aimed at sending learners and/or staff onto mobility activities abroad.

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**National Mobility Consortium**

A group of UK organisations that will work together to manage and deliver a KA1 project. A consortium must include a minimum of three organisations to be eligible.

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**Online Linguistic Support (OLS)**

The European Commission's online platform for Erasmus+ which supports language learning for participants in KA1 mobility activities lasting one month or longer. The OLS allows participants to assess their skills in the foreign language(s) they will use to study, work or volunteer abroad. In addition, selected participants may follow an online language course to improve their competence.

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**Participant Report**

An online questionnaire that is sent from the Mobility Tool+ to participants and completed through EU Survey. The questionnaire allows them to provide feedback about the mobility including practical arrangements and recognition of learning outcomes.

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**Participant**

Within a KA1 VET or Adult Education Mobility project, this is anyone who is sent to a receiving country other than their country of origin or that where they are employed, undergoing training or live.

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**Placement**

The period a participant spends at the receiving organisation/in the work place during their mobility in another European country. This starts when they reach their final destination and includes work-based activities, cultural activities, and free time. This ends when they leave the receiving organisation to begin the return journey to the UK.

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**Receiving Organisation**

The organisation responsible for receiving participants from abroad and offering them a study/traineeship programme, a programme of training activities or benefitting from a training opportunity.

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**Sending Organisation**

The organisation that selects learners and/or staff to undertake a mobility abroad. They may be the beneficiary organisation or a partner in a national mobility consortium.

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**Staff**

A person who, on either a professional or a voluntary basis, is in charge of VET, adult education or the strategic development of their organisation. In addition, within a KA1 VET Mobility project which includes teaching/training

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assignments, 'staff' can also mean a person from an enterprise, a public sector and/or a civil society organisation providing VET training at the receiving organisation(s) abroad, or a trainer from an enterprise based in another Programme country providing training at the beneficiary organisation(s).

Beneficiaries should ensure that the participants selected for Staff mobilities are best placed to support the organisation strategically i.e. the organisation benefits from the learning and the competences obtained following their mobility opportunity.

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## **Travel time**

The number of days a participant spends travelling to the receiving organisation and back to the sending organisation. Under Erasmus+ travel time amounts to a maximum of two days, typically one on either side of the mobility activity (although this is not compulsory as the two days can be consecutive if necessary).

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## **Two week placement**

The minimum duration of placement that VET learners can take part in. A two week placement consists of a minimum of twelve days (i.e. Monday to the following Friday) of which ten days must be working days (therefore not including the weekend).

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## **UK NA**

The Erasmus+ UK National Agency (The British Council in partnership with Ecorys UK)

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## **Work-based learning**

Acquisition of knowledge and skills through carrying out and reflecting on tasks in a vocational context, either at the workplace (such as alternance training) or in a VET institution<sup>3</sup>.

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<sup>3</sup> Adapted from Cedefop, Terminology of European Education and Training Policy, Publications Office of the European Union, Luxembourg, 2014. As above.