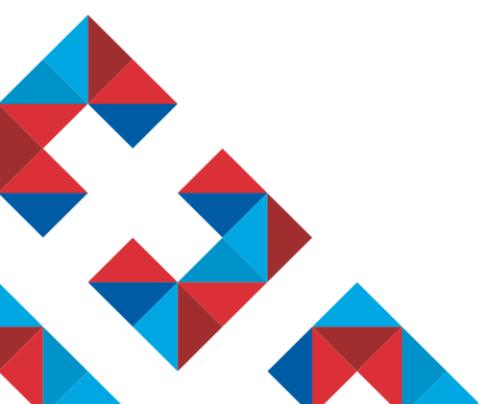


2015 Key Action 2 Handbook

For KA2 Strategic Partnerships in VET, Adult
Education and Youth



Overview of Changes

This document is **version 2** of the 2015 Key Action 2 (KA2) Strategic Partnerships Handbook for VET, Adult Education and Youth beneficiaries. If future versions of the Handbook are created, the table below will record an overview of changes made compared to previous versions:

Page number in previous version	Change	Page number in this version
p. 28	Addition to Transnational Project Meetings to indicate 'if applicable.'	p. 29
p. 30	Updated guidance on participant travel (venue of departure and arrival).	p. 30
p. 40	Amended guidance on exchange rates.	p. 40

Contents

1. General Definitions	5
2. Introduction.....	10
3. Background	11
3.1. The Erasmus+ Programme.....	11
3.2. Key Action 2 Strategic Partnerships.....	11
3.3. Activities	11
4. Contracting Process	13
4.1. Grant Agreement and Annexes	14
4.2. Changes to Grant Agreements	16
5. Management of your Project.....	18
5.1. Quality Assurance	18
5.2. Roles and Responsibilities.....	19
5.3. Mobility Tool+	21
5.4. Recognition and validation of learning	21
5.5. Evaluation.....	22
5.6. Dissemination and Exploitation of Results	22
6. National Agency Monitoring Activities	25
6.1. Record Keeping.....	25
6.2. Monitoring Calls.....	26
6.3. Audits, Checks & Monitoring Visits	26
7. Financial Management.....	29
8. Payment Arrangements	42
9. Progress Report.....	42
10. Interim Report.....	43
11. Final Report.....	43
12. More Help and Advice	45

1. General Definitions

Accompanying Person	<p>As a general definition applying to all fields of education, training and youth, an accompanying person is the one who accompanies participants - whether learners or staff/youth workers - with special needs (i.e. with disabilities) in a mobility activity, in order to ensure protection, provide support and extra assistance.</p>
Activity	<p>A set of tasks carried out as part of a project.</p> <p>Under KA2 Strategic Partnerships this would include:</p> <ul style="list-style-type: none"> - Activities around exchanges of practices; innovative practices; recognition and validation of knowledge, skills and competences; cooperation between regional authorities. - Activities supporting learners with disabilities/special needs or combating segregation and discrimination. - Activities aimed at equity, diversity and inclusion. - Transnational initiatives encouraging active citizenship and entrepreneurship (including social entrepreneurship).
Adult education	<p>All forms of non-vocational adult education, whether of a formal, non-formal or informal nature.</p>
Adult learner	<p>Any person who, having completed or is no longer involved in initial education or training, returns to some forms of continuing learning (formal, non-formal or informal).</p>
Beneficiary	<p>The applicant organisation becomes the grant beneficiary when the proposal is approved and then assumes overall responsibility for carrying out the project.</p> <p>The beneficiary signs a grant agreement with – or is notified of a grant decision by – the National Agency (NA) or Executive Agency that has selected the project. If the application was made on behalf of other participating organisations, the partners may become co-beneficiaries of the grant.</p>
Co-financing	<p>Co-financing implies that the EU grant may not finance the entire costs of the project; the project must be funded by sources of co-financing other than the EU grant.</p>

<p>ECVET</p>	<p>European Credit System for Vocational Education and Training is a system that aims to facilitate the validation, recognition and accumulation of work-related skills and knowledge acquired during a stay in another country or in different situations. For further information please visit: http://www.ecvet-toolkit.eu/</p>
<p>Erasmus+ Programme</p>	<p>A programme funded by the European Commission from 2014 to 2020, which offers a range of funding opportunities for UK organisations actively involved in delivering education, training, youth and sport activities.</p>
<p>Erasmus+ Project Results Platform (PRP)</p>	<p>The European Commission’s dissemination platform for Erasmus+ projects, specified as VALOR in your grant agreements.</p>
<p>Europass</p>	<p>Europass is a portfolio of five documents which help to make the holder’s skills and qualifications clearly and easily understood across Europe. The documents are: Europass CV, the Diploma Supplement, the Certificate Supplement, the Europass Mobility and Language Passport. Europass also includes the European Skills Passport, a user-friendly electronic folder that helps the holder to build up a personal, modular inventory of his or her skills and qualifications. The aim of Europass is to facilitate mobility and improve job and lifelong learning prospects in Europe. For further information please visit: https://europass.cedefop.europa.eu/en/about</p>
<p>Exceptional Costs</p>	<p>A contribution to the real costs incurred in relation to the sub-contracting of goods or services that cannot be provided by the beneficiary organisations themselves.</p>
<p>Grant Agreement</p>	<p>A legally binding agreement issued by the UK NA to the beneficiary, which defines the roles and responsibilities of each party and those of the co-beneficiaries to the agreement (i.e. the other partners).</p>
<p>Groups of young people active in youth work but not necessarily in the context of a youth organisation (also informal group of young people)</p>	<p>Group of at least four young people which does not have legal personality under the applicable national law, provided that their representatives have the capacity to undertake legal obligations on their behalf. These groups of young people can be applicants and partners in some Actions of Erasmus+. For the purpose of simplification, they are assimilated to legal persons (organisations, institutions, etc.) in this Handbook and fit within the notion of Erasmus+ participating organisations for the Action in which they can take part. The group must</p>

	be composed of at least four young persons and their age should be according with the overall age of the young people in the programme (13-30).
Informal learning	Learning resulting from daily activities related to work, family or leisure which is not organised or structured in terms of objectives, time or learning support; it may be unintentional from the learner's perspective.
Intellectual Outputs	Substantial, high quality tangible outputs of the project such as open educational resources, curricula, IT tools or other pedagogical materials.
Key Action 2 (KA2)	A strand of the Erasmus+ Programme which supports Strategic Partnership projects. KA2 projects can address one or more fields of education, training and youth, and aim to develop, transfer and/or implement innovative practices and promote the exchange of practice. KA2 projects can involve a range of different activities, including transnational teaching, training and/or learning activities where these contribute to achieving the objectives of the project.
Learning Outcome	A statement of what a learner knows, understands, and is able to do on completion of a learning process, which is defined in terms of knowledge, skills and competences.
Training, Teaching and Learning Activities	Short or longer term periods of training or work placements for staff or learners taking place in the country of one of the organisations participating in the KA2 project. The activities must add value to the project and contribute to achieving the overall project objectives.
Legal Representative	An individual authorised to sign legally binding documents on behalf of the beneficiary organisation.
Mobility Tool+	The online management and reporting tool for all Erasmus+ beneficiaries.
Multiplier Events	National or transnational conferences, seminars or events aimed at sharing and disseminating Intellectual Outputs produced by the project. Only projects delivering Intellectual Outputs can include Multiplier Events.
Non-formal learning	Learning which takes place through planned activities (in terms of learning objectives and learning time) where some form of learning support is present, but which is not part of the formal education and

	training system.
Participant	Anyone who is sent to a host country other than their country of origin or where they are employed, training or reside, to participate in a funded project activity. Under certain actions of the Programme (i.e. KA2 Strategic Partnerships) a distinction is hence to be made between this category of participants (direct participants) and other individuals indirectly involved in the project (e.g. target groups).
Partner (organisation)	Participating organisation involved in the project but not taking the role of applicant.
People with fewer opportunities	Persons facing some obstacles (e.g. disability, economical obstacle, educational difficulties, cultural differences, health, social, geographical etc.) that prevent them from having effective access to education, training and youth work opportunities.
People with special needs	A person with special needs is a potential participant whose individual physical, mental or health-related situation is such that his/her participation in the project or mobility activity would not be possible without extra financial support.
UK NA	The Erasmus+ UK National Agency (The British Council in partnership with Ecorys UK)
Young people	In the context of the Erasmus+ Programme, this means individuals aged between 13 and 30.
Youthpass	<p>The European tool to improve the recognition of the learning outcomes of young people and youth workers from their participation in projects supported by the Erasmus+ Programme. Youthpass consists of:</p> <p>a) certificates that can be obtained by participants in several Actions of the Programme; and</p> <p>b) a defined process which supports young people, youth workers and youth organisations to reflect about the learning outcomes from an Erasmus+ project in the field of youth and non-formal learning. Youthpass is also part of a broader European Commission strategy which aims to enhance the recognition of non-formal and informal learning and of youth work in Europe and beyond.</p>

Youth worker	A professional or volunteer involved in non-formal learning who supports young people in their personal socio-educational and professional development.
---------------------	---

2. Introduction

The 2015 KA2 Handbook for Key Action 2 (KA2) Strategic Partnerships in VET, Adult Education and Youth is designed to help UK beneficiaries with the management of their 2015 KA2 project. The information contained in this document aims to supplement that provided within your grant agreement, any additional annexes and the 2015 Programme Guide as well as acting as a quick reference point for common queries and procedures. Please ensure you refer to these documents regularly throughout the lifetime of your project to ensure you are managing your grant in accordance with programme rules.

In the UK, the National Agency (UK NA) is a partnership between the British Council and Ecorys UK. Each organisation manages specific parts of the programme, with the British Council responsible for Schools and Higher Education, Ecorys UK responsible for Adult Education and Vocational Education and Training, and both organisations responsible for managing different aspects of Youth funding. The UK NA aims to help UK organisations make the most of the opportunities provided by the programme as well as supporting beneficiaries once they have been successful in obtaining funding. We are responsible for receiving and selecting applications, for distributing grants, assisting beneficiaries during the project lifecycle and reporting on the results of the programme.

Please note that this document maybe subject to change throughout the course of the programme. Changes will be recorded on page 2 of this document, and the most recent version will be found on our website at: <https://www.erasmusplus.org.uk/manage-your-grant>.

3. Background

3.1. The Erasmus+ Programme

The European Commission's Erasmus+ Programme offers a range of funding opportunities for UK organisations actively involved in delivering education and training. The programme aims to support the acquisition and use of knowledge, skills and qualifications to facilitate personal and professional development.

3.2. Key Action 2 Strategic Partnerships

KA2 Strategic Partnerships provide an exciting opportunity for organisations to work together in order to develop, implement and/or transfer innovative practices, leading to high quality teaching, training, learning and youth work, institutional modernisation and societal innovation in the fields of Vocational Education and Training (VET), Adult Education (AE) and Youth. KA2 projects are flexible and can involve a range of different activities depending on the size and the scope of the project. These can include transnational project meetings, the development of Intellectual Outputs, and Multiplier Events. Projects can also involve transnational training, teaching or learning activities, provided these activities contribute to achieving the overall objectives of the project.

KA2 Strategic Partnerships are open to organisations from both Programme and Partner Countries. However, when involving organisations from Partner Countries their essential added value to the project must be clearly demonstrated. There are also some restrictions on activities that can take place in Partner Countries. Please refer to Annex III of your grant agreement for further details.

3.3. Activities

KA2 projects can range from smaller-scale cooperation projects focussing on the exchange of knowledge and practice, to large-scale projects focussing on the development and exchange of innovative outputs. . It is important to note that your project has been approved on the basis of your grant application and that only approved activities will be considered eligible.

The types of project activities that can be included in a KA2 Strategic Partnership project are outlined below:

3.3.1 Project Management and implementation

This covers a range of general or more specific project management activities, for example:

- project management (planning, managing finances, coordination, communication between the partners);
- smaller-scale Training, Teaching and Learning materials, tools and approaches;
- virtual cooperation and local project activities (e.g. classroom project work with learners, youth work activities, organisation and mentoring of embedded learning/training activities);
- Smaller-scale information, promotion and dissemination activities (e.g. brochures, leaflets, website).

3.3.2. Transnational Project Meetings

These are meetings between the project partners to discuss the coordination and implementation of the project. The meetings are hosted by one of the funded partner organisations in the location where they are based. Most KA2 projects will involve some transnational project meetings. Please note that Transnational Project Meetings are not a compulsory requirement for KA2 projects but they are strongly recommended by the UK NA, particularly for larger and more complex projects.

3.3.3. Intellectual Outputs

Intellectual Outputs are substantial, high quality tangible outputs such as open educational resources, curricula, IT tools, studies or other pedagogical materials. They should have potential for wider use, exploitation and impact. Not all KA2 projects will include Intellectual Outputs.

3.3.4. Multiplier Events

Multiplier Events are national or transnational conferences, seminars or events aimed at sharing and disseminating Intellectual Outputs produced by the project. Only projects delivering Intellectual Outputs can include Multiplier Events, so these will not be applicable to all KA2 projects.

3.3.5. Training, Teaching and Learning Activities

Some KA2 projects may also include Training, Teaching and Learning activities, where these bring added value to the project and support the achievement of the overall project objectives. There are three types of activities that can be carried out under KA2:

Blended mobilities: This is where VET learners or Adult Education learners or youth from partner organisations work together using ICT tools such as social media, video conferencing or live streaming, and through physical meetings. The physical meetings can last from a minimum of five days up to two months (excluding travel days), but the virtual element may last for the whole of the project duration.

Short-term joint staff training events: This is where partners can arrange training sessions for small groups of VET or adult education staff or youth workers from each of the partner organisations. Joint staff training events must last between five days and two months, excluding travel days.

Long-term teaching and training assignments: This is where VET or adult education staff or youth workers either teach or work alongside other staff in a VET, adult education or youth institution or relevant organisation (such as an enterprise, a non-governmental organisation, school authority or youth club). This can include teaching placements, participation in seminars or structured courses or observation periods, to allow staff to experience a different working environment, increasing professional, personal and intercultural competences. Teaching and training assignments must last between two and 12 months, excluding travel days.

You will be expected to deliver the project activities and outputs outlined in your application form and approved in your grant agreement (annexes I - II). You should therefore refer back to these documents regularly and review progress with your partners to ensure your project is on track. If any project activities are not delivered as outlined in the original application your final approved grant amount may be reduced by the UK NA.

Transnational Youth Initiatives

Some KA2 projects may choose to develop a Transnational Youth Initiative. These are Strategic Partnerships in the field of youth that are initiated, set up and carried out by young people themselves. The projects must be transnational: carried out by two or more groups of young people from different countries. Transnational Youth Initiatives may involve a coach to support the quality of the learning process and to support the group in achieving their objectives.

4. Contracting Process

Following the assessment and selection process, all successful beneficiary organisations are required to enter into a grant agreement with the UK NA.

Before commencing any funded project activity you must have a signed grant agreement with the UK NA and you will be sent detailed instructions on how to complete the contracting process. Any eligible project activities undertaken between your project start date and the date the agreement is signed by the UK NA will be covered retrospectively provided they are in line with the terms of the

agreement. However, any activity undertaken before the agreement is signed by the UK NA is done so at your own risk. If for any reason we are not able to contract with you, these costs will not be covered by the UK NA. After the contracting process you will also be allocated a Project Officer within the UK NA who will be your principle point of contact for all issues relating to the administrative and financial management of your project.

4.1. Grant Agreement and Annexes

The KA2 grant agreement is a multi-beneficiary agreement, which means that all partners in the consortium are beneficiaries to the agreement. The grant recipient is referred to as the Coordinator within the grant agreement. All successful beneficiary organisations must enter into contract with the UK NA by signing a grant agreement, which includes a number of annexes. It is important to familiarise yourself with the terms of your grant agreement and annexes and to ensure that your project partners are also aware of these.

Depending on your project and the types of activities it includes, you will receive the grant agreement and some or all of the annexes mentioned below:

Part I: Special Conditions of the Grant Agreement

The grant agreement consists of two sections, the first one being Part I Special Conditions which includes some important information that is specific to your project, including the start and end dates, project name, grant awarded, reporting deadlines and bank account details.

Part II: General Conditions of the Grant Agreement

Part II is downloadable from our website (<https://www.erasmusplus.org.uk/general-conditions>) and should be read in conjunction with Part I. The document contains essential requirements, with Part A covering legal and administrative provisions including general obligations, communications, processing of personal data, visibility of European Union funding, subcontracting and termination of the agreement. Part B covers financial provisions including eligible costs by sector and Key Action, checks and audits and monitoring and evaluation.

Annex I, IA, IB and II: Description of the Project and Estimated Budget

Annexes I, IA and IB of the grant agreement detail the Training, Teaching and Learning activities, Intellectual Outputs and Multiplier Events approved for your project. Information in these annexes is based on your application, taking into account any changes made by the UK NA prior to the

approval of your project. Any Training, Teaching and Learning activities, Intellectual Outputs or Multiplier Events that are not listed in Annex I, IA and IB have not been approved and cannot be funded.

Annex II shows a summary of the budget awarded for the project. The maximum total grant awarded for the project is shown under 'Total Granted'. The budget amounts shown for each budget item are the maximum amounts awarded, subject to any budget transfers permitted under the rules outlined in article I.3.2 of the grant agreement. Any changes falling outside of these rules will require formal approval by the UK NA. More information on budget transfers can be found in section 7.10 of this document.

Annex III: Financial and Contractual rules

This annex provides important information on the financial and contractual rules that apply to your project. Please ensure you read this Annex thoroughly. The UK NA has highlighted important sections of this Annex where possible within the 2015 KA2 Handbook; however it is your responsibility to ensure you understand and comply with the requirements. Failure to do so may result in you having to repay all or part of your grant to the UK NA. You should also ensure that your partners are aware of these requirements.

Annex IV: Templates Beneficiary/Participant Agreements

Not applicable for KA2 VET, Adult Education or Youth.

Annex V: Partner Mandates

This annex contains the partner mandates from all partners approved to participate in the project.

Annex VI: List of Other Beneficiaries

This Annex is a list of all the project partners approved to participate in the project.

In order to be eligible, a KA2 VET or Adult Education Strategic Partnership must always have a minimum of three organisations from three different Programme Countries. KA2 Youth Strategic Partnerships may have a minimum of two organisations from two different Programme Countries in so long as all organisations are youth organisations or groups of young people active in youth work but not necessarily in the context of a youth organisation. If this is not the case KA2 Youth Strategic Partnerships will also require a minimum of three organisations from three different Programme Countries. If projects lose partners and fall below the minimum required number, unfortunately the project will not be able to continue and the agreement will be terminated by the UK NA.

4.2. Changes to Grant Agreements

Your 2015 KA2 project has been approved by the UK NA based on the information you provided in your original grant application, which now forms part of your grant agreement. You are therefore expected to deliver your project on this basis.

You should note that the UK NA is not obliged to approve changes to your project and will only do so in exceptional circumstances. As such, you should not action any changes until you have received written confirmation from the UK NA (verbal agreements are not binding on either party). 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.

Any request for a contract amendment must be received by the UK NA in good time before the intended implementation of the changes in order to allow sufficient time for approval. The UK NA will respond to your request within 45 days of receiving all correct documentation. The UK NA is unable to process any amendment requests less than one month before the end of project activity, in accordance with European Commission guidance. You should therefore ensure that your project is on track and no changes need to be made at this late stage. Please refer to Article II.11.3 of your grant agreement for further information.

Table 1 below provides details of the requests that are deemed minor or significant.

Change Requested	Permitted		Not Permitted
	Notification Only	Significant Change (formal request)	
Contact person	✓		
Legal signatory	✓		
Beneficiary address (Coordinator & partners)	✓		
Bank details	✓		
Project activities		✓	
Beneficiary organisation			✓
Beneficiary Organisation name (Coordinator)		✓	
Partner withdrawal		✓	
New/Replacement partners		✓	
Project duration		✓	
Reporting schedule		✓	
Project budget		✓	

Table 1 – KA2 contract amendments

Although 'Notification Only' changes do not require an amendment to your original grant, updated documents may be required as a result of the change; therefore you must notify your Project Officer at the UK NA via email and they will provide you with further guidance.

Significant changes will require strong justification and will only be approved in exceptional cases. You must send your initial request via email to your Project Officer, outlining the proposed changes and the reasons for these. Where appropriate, your Project Officer will then send you the relevant contract amendment documents and annexes which you will need to complete and submit to the UK NA for further consideration.

A partner withdrawal is treated as a significant change and you should seek approval from your Project Officer. A number of areas will need to be checked before this can be approved, such as whether:

- the project still has the minimum required number of partners;
- the project budget has been adjusted appropriately;
- The remaining partners are able to take over the withdrawing partner's roles and responsibilities.
- Whether the change impacts on the projects aims and objectives or calls into question the original assessment.

The addition of new partners will only be considered in exceptional circumstances where a strong rationale is provided and where the existing partners have withdrawn. Each request will be assessed by the UK NA on a case by case basis and only if a very strong case is submitted to the UK NA with supporting evidence demonstrating that without a partner replacement the project would collapse. Please also be aware that approval for significant changes is not guaranteed as these change requests may call into question the original decision upon which your organisation was awarded the grant.

5. Management of your Project

5.1. Quality Assurance

The UK NA strives to ensure that only the highest quality applications are funded and to provide as much help and support as possible throughout your project's lifetime. However, it is your responsibility to ensure that the aims, objectives and outputs of your project are achieved to a high standard, as detailed in your original application.

You will be assigned a Project Officer at the UK NA to support you in delivering your project. During the course of your project you may be asked to provide information about progress and key milestones. This information should be as accurate as possible as your Project Officer will use this to monitor the progress of your project. You should ensure that you keep in regular contact with your Project Officer so that the UK NA can provide ongoing help and guidance to ensure that your project is implemented successfully and is of high quality.

Although projects are not obliged to use partnership agreements, the UK NA recommends that these are used in Strategic Partnership projects to ensure that all parties involved understand their responsibilities and are committed to delivering a high quality project. You can design your own partnership agreement based on the needs of your project. However, you may wish to reference some of the key requirements outlined in the grant agreement and annexes.

Some areas for you and your partners to consider in implementing a high quality project include:

- having a strong and committed partnership in place;
- having an agreement in place to ensure that all partners are aware of their roles and responsibilities;
- ensuring that there are clear and effective mechanisms in place for communication and coordination between partners;
- ensuring that there are clear and appropriate monitoring arrangements in place;
- having clear management strategies in place, with appropriate personnel responsible for managing the project;
- having clear financial reporting mechanisms and an appropriate accounting system in place to ensure all evidence of expenditure is recorded appropriately (prior to inputting information onto the Mobility Tool+);
- having quality control measures in place to allow you to evaluate the impact and the progress of the project on an ongoing basis and ensuring appropriate action is taken if required within the project budget and project time-frame;
- having a (SMART) dissemination plan in place to ensure that all parties disseminate project results to the relevant target groups, using appropriate channels at different stages of the project; and
- having a sustainability plan in place to ensure the project delivers ongoing impact after the EU funding has ended.

Projects carrying out Training, Teaching and Learning activities should also ensure the following:

- support with relevant preparation is provided to participants prior to the mobility activity and practical support is available throughout the period of the mobility activity; and
- monitoring and mentoring arrangements are in place for participants prior, during and after the mobility activity.

Where possible, training content is validated using an appropriate method, for example Europass or ECVET.

5.2. Roles and Responsibilities

Article II.I of the grant agreement outlines the key roles and responsibilities of the beneficiaries in delivering the project. You should ensure that you and your partners understand these and you may also want to incorporate them in your partnership agreement, where appropriate.

The **joint** responsibilities of **all beneficiaries** are to:

- carry out the Project in accordance with the terms and conditions of the grant agreement;

- comply with any legal obligations outlined in the agreement; and
- agree appropriate internal arrangements to ensure the proper implementation of the project.

The responsibilities of the **Coordinator** are to:

- monitor and ensure the project is implemented in accordance with the grant agreement;
- act as the intermediary for all communications between the beneficiaries and the UK NA;
- inform the UK NA of any change to the name, address, legal representative, legal, financial, technical, organisational or ownership situation of any of the beneficiaries;
- inform the UK NA of any event likely to affect or delay the implementation of the project;
- be responsible for supplying all documents and information to the UK NA required under the grant agreement;
- be responsible for obtaining and verifying any information required from the other beneficiaries before passing it on to the UK NA;
- establish the requests for payment in accordance with the Agreement;
- ensure that appropriate payments are made to the other beneficiaries without unjustified delay. All payments should be made to the other beneficiaries by bank transfer and appropriate evidence of the amounts transferred to each beneficiary for any checks should be kept;
- provide all the necessary documents in the event of checks and audits initiated before the payment of the balance;
- update the online reporting system 'Mobility Tool+' (Please see the [Mobility Tool+ User Guide](#) for further guidance on how to do this); and
- update the online Erasmus+ Project Results Platform.

Coordinators are responsible for managing the project budget in order to ensure the successful implementation of the project. They can choose to make pre-financing payments to partners according to the project's requirements and key milestones. However, it is important to consider the risks associated with the level of pre-financing payments. Coordinators may consider paying partners smaller amounts of pre-financing and linking payments to results and outcomes. It is recommended that Coordinators clearly outline the timing and conditions for payments to partners in any partnership agreement.

The responsibilities of the **beneficiaries** (partners) are to:

- inform the Coordinator of any changes to their name, address, legal representative, legal, financial, technical, organisational or ownership situation;

- inform the Coordinator of any event likely to affect or delay the implementation of the project; and
- submit any data, documents or information required for UK NA reporting, audits, checks, monitoring or evaluation in good time to the Coordinator.

5.3. Mobility Tool+

The Mobility Tool+ is the online management and reporting system that all Coordinators must use to manage and report on their KA2 project. Once the tool is available for KA2, Coordinators will need to update it regularly with information on all project activities and expenditure. The Mobility Tool+ will also be used to complete and submit interim and final reports to the UK NA. It will be very important that the Mobility Tool+ is kept up to date at all stages of your project life cycle and that the information is accurate.

For further information please refer to the [Mobility Tool+ User Guide](#). This document will be updated once the Mobility Tool+ is released for KA2. In the interim, the UK NA will support you to gather and record the information you will need to input into the Mobility Tool+.

5.4. Recognition and validation of learning

It is important that all activities are either formally or informally validated. Validation through one of the European recognition and validation tools is strongly recommended, but other less formal methods are acceptable, such as certificates of achievement created by the participating organisations. Formal forms of validation are as below and should be utilised where possible:

Youthpass

Youthpass is a European recognition tool for non-formal and informal learning in youth work, developed by SALTO, initially for the Youth in Action programme. The SALTO Network organises training and contact-making activities to support organisations and National Agencies within the frame of the European Commission's Erasmus+ :Youth in Action programme (You can check the European training calendar on the Salto Youth website) The UK NA strongly encourages beneficiaries to use Youthpass for projects funded by Erasmus+ in the field of youth to help participants to record their learning and skills development, which can then be used to support job applications or applications for further courses.

For further information on Youthpass visit <https://www.youthpass.eu>.

Europass

If your KA2 project includes elements linked to employability, you could consider the use of Europass to validate the skills that your participants gained during the project. Europass is a European-wide initiative which aims to help individuals to present and document their skills and qualifications in a clear and transparent way throughout Europe. Europass consists of five documents which enable potential employers to understand which subject has been studied, what training has been completed and how much experience has been gained.

For further information regarding Europass visit www.uknec.org.uk.

Language Validation

Europass includes the Europass Language Passport, which is a way of validating language skills gained on mobilities as well as adding information about other language training (either formal or informal).

5.5. Evaluation

You and your partners should monitor the progress and evaluate the impact of your project throughout the project lifecycle, in line with the plans set out in your application form. A robust monitoring and evaluation strategy will allow you to measure whether and to what extent the aims and objectives of the project are being met, whether the project is on track to deliver the planned activities and outputs, and whether if any corrective action needs to be taken. It is also important to capture the impact of the project at a local, sectoral, regional, national and European level.

Whilst the Coordinator may lead on monitoring the progress of the project, it is recommended that all partners be actively involved in evaluation activities. Results of evaluation activities should be circulated to appropriate staff within the beneficiary organisations and all partners should consider what action, if any, is required to address the evaluation outcomes.

5.6. Dissemination and Exploitation of Results

Dissemination is important in order to share the results, outcomes, successes and lessons learned during your project as well as after the project has ended as widely as possible and to maximise the wider and long term benefits to the community and the potential to influence national and European policy and practice in education, training or youth. You should disseminate your project in line with the dissemination plans outlined in your original application, which should cover why, what, how, when, to whom and where dissemination will take place.

Dissemination should be considered throughout the life of the project and also after the project has ended. You can disseminate the concrete (tangible) results of the project as well as the skills and experiences participants have acquired through participating in the project (intangible results).

Tangible results may include:

- a tool, approach or a model ;
- educational resources, curricula or materials;
- reports or studies;
- good practice guides or case studies;
- newsletters or information leaflets;
- evaluation reports.
- recognition certificates.

Intangible results may include:

- knowledge and experience gained by learners or staff;
- increased skills or achievements;
- improved cultural awareness;
- Improved language skills.

Dissemination is an essential part of all Erasmus+ funded projects and aims to raise awareness about your project, its activities and outcomes. All beneficiary organisations and their participants (where applicable) should be actively involved in dissemination activities. Beneficiary organisations should disseminate their findings and look to exploit project results via formal and informal networks. Any good practice or lessons learned through the project should be implemented within the beneficiary organisations and, where possible, disseminated through their wider local, regional, national and/or European networks.

The UK NA can also support you to disseminate your project activities and outcomes. We will be looking to gather and showcase examples of good practice and these may be used as case studies on the Erasmus+ website. In particular, we are looking to showcase projects that have developed a strong and productive partnership and delivered high quality results and impacts. If you would be interested in submitting a case study about your project, please contact your Project Officer and they will send you a short case study template to complete. Where possible we encourage you to send photos, videos, and/or links to project websites or published results to supplement your written case study.

We also encourage you to engage with the UK NA's social media channels:

Erasmus+ UK Facebook: <https://www.facebook.com/ukerasmusplus>

Erasmus+ UK Twitter: <https://www.twitter.com/erasmusplusUK>

Feel free to tag/mention us in photos or updates and we will try to retweet/share them.

Erasmus+ Project Results Platform

The [Erasmus+ Project Results Platform](#) (PRP) is a new dissemination platform developed by the European Commission for Erasmus+. It offers a comprehensive overview of projects funded under the programme and highlights best practices. The platform serves as a useful tool in disseminating the outcomes of your project and makes available any tangible resources, products, deliverables and outputs which have resulted from funded projects.

Your project summary will automatically be published once your grant agreement has entered into force, and you will need to upload your final project results onto the platform before the end of the project. This is a contractual requirement as mentioned in Article I.10.2 (referred to under the platform's former name: VALOR) of your grant agreement and will be checked as part of the assessment of your final report. However, uploaded outputs/results will not be openly visible until the final report is validated by the UK NA.

Erasmus+ Logo

You must publicly acknowledge the support received from the European Union by including the European Commission's Erasmus+ logo on any project outputs or promotional materials. Article II.7 of your grant agreement contains information about the Visibility of Union funding. Further information and links to the Erasmus+ programme logos can be found on the Erasmus+ website: <https://erasmusplus.org.uk/news/how-to-use-the-erasmus-logo>. The preferred option to communicate about EU funding is to write 'Co-funded by the European Union' next to the EU emblem on the communication material where the EU emblem is used. The programme logo should comply with the requirements of the Graphic Design User Guide for Erasmus+ available at http://ec.europa.eu/dgs/education_culture/promotional_en.htm

In addition, you must include a disclaimer on any publication produced by the project to indicate that it reflects only the author's views and that the European Commission and UK NA are not responsible for any use that may be made of the information it contains.

Intellectual Property Rights

As mentioned in Article II.8.1 of the grant agreement, the beneficiaries have rights of ownership of any results produced by the project. However, where any pre-existing industrial or intellectual property rights exist it is important to ensure that you have the right to use these during the implementation of the project. In such cases, the beneficiaries should produce a list showing the rights of ownership and use of any pre-existing industrial or intellectual property rights and disclose this list to the UK NA.

Availability of Educational Resources

The grant agreement specifies that any educational resources produced by the project must be made available online, free of charge and under open licences.

6. National Agency Monitoring Activities

As Coordinator you are accountable to the UK NA for the implementation of the project, for the use of funds received and for the amounts paid to partners. You must therefore ensure that appropriate reporting and monitoring procedures are put in place. Project monitoring should involve checking the financial performance and general performance of the project against the objectives set out in the application. You must gather and retain all necessary information and documentary evidence which demonstrates clear and transparent management of the project, as this may be inspected by the UK NA or the European Commission. For further information on financial management see section 7 below.

To ensure the success of your project it is important to monitor the project throughout its lifetime. Effective monitoring will also allow you to identify any problems early on so that you can take any action necessary to ensure that the project remains on track.

6.1. Record Keeping

You should only keep original documents for your own organisation. As per Article II.20.2 of the grant agreement, the beneficiaries (i.e. all partners) should keep their own original documents, stored in any appropriate medium for the required duration (see section 7.8 of this document). Your partners should be ready to send you their original evidence of expenditure in case this is requested during a check or an audit.

In the event of any checks or audits Coordinators will be required to supply original supporting documents, including supporting documents from partners. Where partners are not legally authorised to send original documents, the partner(s) concerned may submit copies.

As the project Coordinator, you are responsible for the financial reporting on the project and you are required to keep documents in a format and language which would allow the UK NA or any external bodies authorised to check your project to understand the contents of the supporting documents. Therefore, if your partners submit their evidence in a language other than English, you should ensure key information is translated so as to allow the UK NA or any other authorised body to be able to understand what each document is and its contents.

It is important to note that the UK NA will return the original documents submitted to the Coordinator upon completion of any audits or checks.

6.2. Monitoring Calls

The UK NA may undertake monitoring calls in order to support you to deliver your project successfully and in line with the requirements. If your project is selected, your Project Officer will schedule these calls with you throughout the lifetime of your project.

The purpose of the calls is to:

- monitor project progress against the **planned and agreed** objectives, activities and outputs mentioned in the application form and grant agreement;
- ensure that proper project and financial management systems are in place;
- provide advice and support to beneficiaries;
- gather information on the impact of projects on the participants and organisations involved;
- Identify examples of good practice and potential case studies to promote the Erasmus+ Programme.

Monitoring Calls will be scheduled with you and conducted by your Project Officer at periodic intervals. A monitoring call may last up to one hour. In some cases there may be action points for you or the UK NA to follow up after the call with a set deadline to be adhered to.

6.3. Audits, Checks & Monitoring Visits

The UK NA is also required by the European Commission to undertake audit and monitoring visits to a representative sample of organisations each year to ensure that their management of the Erasmus+ project is satisfactory and within the terms of the grant agreement.

There are three types of visit and two types of checks which can be undertaken by the UK NA or other agencies:

- Monitoring Visits
- On the Spot Checks during the project lifetime
- On the Spot Checks (Audit Visits) after completion of the project
- Desk checks
- Final Report checks

All projects will have their final report assessed by the UK NA. In addition, some projects may be selected for one or more of the additional checks or visits. If this is the case, you will be informed by the UK NA and we will provide details of the information or documents required.

Monitoring Visits

The UK NA may visit your organisation during the project's lifetime. A monitoring visit is an opportunity to review the project's progress against planned activities and showcase its achievements. Prior to the visit, the UK NA will contact you to agree a draft agenda and any practical arrangements.

The key areas for discussion are likely to be:

- Project management, progress and implementation
- Project partnership
- Recruitment and preparation of participants (if applicable)
- Project evaluation and future activity
- Impact of the project
- Dissemination
- Financial information

The visit provides an opportunity for the UK NA to review whether the project is progressing in line with the application and the grant agreement and to offer additional advice or support where necessary. It is also an opportunity for the UK NA to capture examples of good practice and for you to ask us any questions you may have about your project.

The information gathered during the visit will be used to inform reports produced for the UK Department for Business, Innovation and Skills (the National Authority for the programme in the UK) and the European Commission about the progress and impact of the Erasmus+ Programme.

Within a month of the visit you will be sent a draft visit report and you will have an opportunity to comment on this before the report is finalised.

On the Spot Checks during the Project

Some projects will also be selected at random to receive an 'on the spot check during the project lifetime'. During these checks the UK NA will verify that project activities have taken place and outputs have been produced in line with the application and the eligibility requirements set out in the grant agreement. The UK NA will need to look at supporting documentation and project results and outcomes during these checks. If you are selected for an on the spot check during the project lifetime, the UK NA will inform you in advance and outline the documents and information required.

In some cases an on the spot check during the project lifetime may be combined with a monitoring visit. If this is the case, more than one member of UK NA staff will attend and there will be a clear division of roles during the visit.

On the Spot Checks after Completion of the Project

Some projects will be selected at random to receive an 'on the spot check after completion of the project'. This type of check will take place after the final report has been submitted to the UK NA. During this process the UK NA will check the supporting documents demonstrating evidence of the 'triggering events' for all unit contribution and actual costs claimed in the final report. Triggering events refer to such occurrences as Multiplier Events, Training, Teaching and Learning activities and Transnational Project Meetings. There will also be checks against the beneficiary's accounting systems, staff records and other elements that can only be verified *in situ*.

Desk Checks

Some projects will be selected at random to receive a desk check, which will be undertaken at final report stage. If you are selected for a desk check, the NA will request original supporting documents to evidence the 'triggering events' and eligibility of costs claimed in the final report in order to establish the final approved grant amount. This check will take place at NA premises and all original documents submitted will be returned to you once the desk check is complete.

Final Report Checks

In addition to any of the above checks, the project Coordinator will need to submit a final report to the NA within 60 days of the project end date which is outlined in the grant agreement. All final

reports will be checked at the UK NA premises in order to establish the final approved grant amount for the project.

7. Financial Management

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 under the following budget headings:

- Project Management and Implementation
- Transnational Project Meetings (if applicable)
- Intellectual Outputs (if applicable)
- Multiplier Events (if applicable)
- Travel, Individual Support and Linguistic Support for Transnational Training, Teaching and Learning Activities (if applicable)
- Special Needs Support (if applicable)
- Exceptional Costs (if applicable)

You can find information regarding the maximum grant amount awarded to your project in Article I.3.1 of your grant agreement. Annex II of your grant agreement provides a breakdown of each budget heading as well as the project's total costs and grant. It is important to note that the total project's grant will not be the arithmetic total of each budget heading if the project's total calculated costs are higher than the grant awarded. For example if a two year project's total costs are €310,000, the maximum grant which can be awarded is €300,000. In this case the amounts awarded to the individual budget headings will not have been amended, however the grant is set at the maximum amount permitted. A further example of this may include projects which have included Exceptional Costs at 100% of their value, under the related category, however only 75% of this value can be awarded in accordance to programme rules.

The below sub-sections are intended to provide guidance regarding each budget heading applicable to KA2 Strategic Partnership project. It is important to note that the applicable rates for contributions to unit cost headings are specified in Annex III of your grant agreement.

7.1 Project Management and Implementation

Costs eligible under this budget category include staff costs for general project management (e.g. planning, coordination, finances, communication), small-scale training/teaching/learning materials and approaches, virtual cooperation and local project activities, and information, promotion and

dissemination (e.g. brochures, leaflets, website). Activities by Managers and Administrative staff should be covered under this budget category rather than in Intellectual Outputs (where applicable).

At the reporting stage, you will need to demonstrate that the activities and outputs covered under this budget category have taken place or have been produced in accordance with your approved application. To demonstrate this, you will need to describe all project activities and outputs in your Final Report and upload any tangible outputs onto the Erasmus+ Project Results Platform (formerly known as VALOR), as well as keep evidence of activities and outputs at your premises.

Organisations can use part of their project grant under this budget category to cover costs associated with attending a project management meeting organised by the UK NA where the UK NA provides advice on the implementation of the Key Action, grant management and contractual reporting. Such costs have to be incurred during the contracted period of the project, as set out in Article I.2.2 of the grant agreement.

7.2 Transnational Project Meetings

The budget awarded under this heading is a contribution towards the travel and subsistence costs associated with meetings held between you and your partners at the location of one of your partners' organisations for implementation and coordination purposes. The amount awarded in Annex II is based on the number of staff approved to participate in each meeting.

As per Annex III of your agreement, the venue for Transnational Project Meetings is expected to be at the location where the receiving organisation is based. This is to maximise the impact of the project on the participating organisations. Please note: partner meetings are expected to take place where the hosting partner is located; if a different location is required a justification must be provided in Mobility Tool+. For example, if you indicated in your application that your French partner, who is based in Paris, will host a meeting, then this meeting is expected to take place in Paris. Unless already foreseen in Annex I as approved by the UK NA, exceptions to this rule have to be justified.

In the event of a change to a meeting location i.e. another country or area/city within the receiving partner country, you would need to justify this on the Mobility Tool + and this justification will only be reviewed at the Final Report stage. All coordinators must realise that there is a risk that the change will not be validated if the NA feels it is not justified.

The beneficiary shall also provide the reason for this difference in Mobility Tool+. Please see Annex III of your grant agreement, and section 4.2 of this document for further details.

To be able to claim costs, you as the Coordinator, will need to report on the number of participants in attendance at each Transnational Project Meeting in the Mobility Tool+. You will need to record the attendee's name, place of origin and place of venue of the meeting for each participant for each Transnational Project Meeting. You will also need to enter the appropriate unit cost on the basis of the one-way distance obtained from the European Commission's online distance calculator: http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm. The Mobility Tool+ will calculate the grant amount automatically on the basis of the applicable unit cost. The Transnational Project Meeting unit costs are intended to be a contribution to both the associated travel and subsistence costs for participants attending Transnational Project Meetings. Funding is based on the number of participants attending and the relevant distance band. For further details please see Annex III of your grant agreement.

For meeting costs to be eligible under the Transnational Project Meetings budget heading, activities must involve participants from partner organisations from at least two different Programme Countries. The distance between their place of departure and arrival must also be at least 100 km (following the Commission's online distance calculator).

When the travel distance for Transnational Project Meetings is less than 100km it is not possible to claim any costs within the projects Transnational Project Meetings budget. In these instances travel can be claimed under the Project Management and Implementation budget.

In addition, in order for costs to be eligible, you and your partners also need to be able to demonstrate a formal link between your organisation and the individuals participating in the meetings (whether as staff on a professional or a voluntary basis, or as learners from the organisation).

As supporting documents for each participant, you need to keep a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the meeting and its start and end dates. For KA2 youth participants an email address of the participant will also be required.

If the place of origin and/or venue reported is different from the place of residence of the participant and the place where the receiving organisation is located' are located, you need to explain the reason for this difference in Mobility Tool+. In this case you will also need to retain your travel

itinerary, including all travel tickets and invoices, specifying the place of departure and arrival, as well as obtain signed declarations from the hosting partner.

7.3 Intellectual Outputs

Your project may have been awarded a budget to produce Intellectual Outputs. Any approved Intellectual Outputs will be listed in Annex IA of your grant agreement and the associated costs outlined in Annex II. Please be mindful that costs associated with Managers and Administrative staff are expected to be covered under Project Management and Implementation and you will only be able to claim staff costs associated with Managers or Administrators against Intellectual Outputs if they are specified in your project application and approved by the UK NA.

To be classed as a member of staff, individuals have to be involved in education, training or youth non-formal learning, including teachers, trainers, school leaders, youth workers and non-educational staff, and those employed by the organisation either on a professional or a voluntary basis. Therefore, costs can be claimed for both staff formally employed through an employment contract or those working for a participating organisation on a voluntary basis.

Intellectual Outputs are based on unit costs therefore beneficiaries should not claim actual salary costs. Annex III of your grant agreement provides details regarding the unit costs available per country.

In order for costs to be eligible, partners need to be able to demonstrate a formal link (on a professional or voluntary basis) with the persons for which staff costs are being claimed. To demonstrate this formal link, you need to keep proof of the nature of the relationship (e.g. employment contracts or volunteer agreements). Timesheets for each person will also need to be kept as per Article II.16.2.5 of your agreement.

All projects should keep the Mobility Tool + as up to date as possible on an ongoing basis and this will be monitored by the National Agency. You will need to input details of all Intellectual Outputs produced in the Mobility Tool+ and upload them onto the Erasmus+ Project Results Platform. You will also need to report the number of days of work specifically for each Intellectual Output per staff category for each partner on the basis of the timesheets kept. Please see Annex III for further details.

Please note that people working for the organisation on the basis of a service contract (e.g. translators, web designers, etc.) are not considered as staff of the organisation. Therefore, their staff time cannot be claimed under Intellectual Outputs. Staff costs incurred by individuals external

to the partner organisations belong under the Exceptional costs budget category and should only be claimed if included and approved in the project's budget.

7.4 Multiplier Events

Multiplier Events funding contributes to the costs incurred for organising events aimed at disseminating Intellectual Outputs produced by a project. The costs awarded and which you can claim are calculated on the basis of the number of participants taking part in each event (staff from partner organisations cannot be included in this figure). Any approved Multiple Events will be listed in Annex IB of your agreement and the associated costs in Annex II. Each Multiplier Event must be one event, as per the original grant application. Please note that Multiplier Events can only take place in the Programme or Partner Countries in countries specified and approved in the Grant Agreement.

If you do not produce a planned Intellectual Output, any related Multiplier Events which were originally approved will not be considered eligible. Multiplier Events funding does not cover general project-related events such as press conferences, however these can be covered under the Project Management and Implementation budget.

To support any Multiplier Event costs, you will need to describe each Multiplier Event in your Final Report, keep proof of attendees for each event in the form of participant lists, and keep an agenda and other documents distributed at the event. Please see Article II.16.2.5 of your grant agreement for further details.

If the UK NA awarded funding for the development of several Intellectual Outputs but only some of them are ultimately delivered, the UK NA will determine the extent to which each of the related Multiplier Events is eligible for funding.

7.5 Special Needs Support

Any grant awarded under this heading, as specified in Annex II of your agreement, is a contribution towards costs which are essential to allow those with disabilities to take part in the approved Training, Teaching and Learning activities. Please note that this kind of support can only be claimed if costs are additional to those covered by unit contributions.

For Special Needs Support, you must report on the type of additional costs and the actual amount incurred to support disabled participants in the Mobility Tool+. To support the costs you will need to keep invoices, as specified in Article II.16.4.4 of your grant agreement.

7.6 Exceptional Costs

Any grant awarded under Annex II for Exceptional Costs can be used for subcontracting requirements and costs related to the depreciation of equipment, as long as these are specified in your approved application.

For Exceptional Costs, you need to report the actual costs incurred in the Mobility Tool+. The UK NA will reimburse 75% of the eligible costs actually incurred or up to €50.000, whichever is the lowest.

In terms of supporting documents, you will need to retain invoices for subcontracting costs and proof of any costs associated with a financial guarantee, where applicable. To support any depreciation costs, you will need to retain proof of purchase or proof of rental or lease of any equipment. Please see below and Article II.16.4.4 for further details. **Please note that the UK NA will only validate exceptional costs that have been approved as per the application, if any.**

Equipment

The Exceptional Costs budget does not cover normal office equipment or equipment which you and your partners normally use, such as PCs, laptops, printers, etc. These costs belong under the Project Management and Implementation budget.

Subcontracting

As per Article II.9 and II.10 of your grant agreement, where applicable, all projects need to evidence that any subcontracting contracts were awarded to the tender offering best value for money or, as appropriate, to the tender offering the lowest price. Please note that this is the case **even** when a subcontractor was specifically named within in your original application. In doing so, it is important to avoid any conflict of interest. This rule applies in all instances, even where the proposed subcontractor was identified in the application.

It is not possible to add additional subcontracting costs to a project after the application stage. Projects can only incur costs associated with those subcontracting activities which were included and approved within the grant application and therefore represent part of the projects budget. In the event of an underspend in Exceptional Costs, a project is still unable to add additional subcontracting costs which were not originally foreseen.

The costs of a financial guarantee, if requested by the UK NA, can also be claimed under this budget heading.

7.7 Transnational Training, Teaching and Learning Activities

Any approved Training, Teaching or Learning Activities will be listed in Annex I of your grant agreement and the associated costs in Annex II.

You will need to record all of the activities you and your partners undertake in the Mobility Tool+. The Tool will calculate the grant amounts for Travel, Individual Support and Linguistic Support based on the applicable unit cost.

Transnational Training, Teaching and Learning Activities must take place in the countries in which have been approved in the Grant Agreement. Activities associated with learners as well as long-term activities of staff or Youth Workers from or to Partner Countries are never eligible. Participants can take part in an activity held in their own country, providing the activity involves participants from at least two different Programme Countries and that the distance between the place of departure and place of arrival is at least 100 km as per the online distance calculator.

Eligible participants in Transnational Training, Teaching and Learning Activities are individuals who have a direct link with the organisation in one of the following capacities:

- Apprentices, VET students, Adult Learners, or Young People in Blended Mobility; and
- Professors, Teachers, Trainers, educational and administrative staff employed at a participating organisation, or Youth Workers.

The beneficiaries must be able to demonstrate the formal link with those participating in Transnational Training, Teaching or Learning Activities, whether they are involved in the project as staff (either on a professional or a voluntary basis) or as learners.

Below you can find further details on managing the budget awarded for your Training, Teaching and Learning Activities.

Travel

Travel costs are a contribution to the return travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity.

When claiming travel costs you will need to report on the number of participants in each activity on the Mobility Tool+, the dates of the activity and enter the appropriate unit cost on the basis of the one-way distance obtained from the European Commission's online distance calculator: http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm. The Mobility Tool+ will calculate the grant amount automatically. If necessary, you may add one day for travel directly

before the first day of the activity abroad and one day for travel straight after the last day of the activity; these extra travel days will be considered for the calculation of Individual Support.

As supporting documents, you need to keep a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the activity and the dates within which the activity took place. If the place of departure and/or arrival reported are different from the place where the sending organisation (for departure) and the place where the receiving organisation (for arrival) are located, you need to provide a justified reason for this difference in the Mobility Tool+. In this case you will also need to keep all travel tickets and invoices, specifying the place of departure and arrival, as well as obtain signed declarations from the receiving partner. Please see Article II.16.2.5 and Annex III of your grant agreement for further details.

Individual Support

Individual Support is intended to cover subsistence costs incurred by participants, including accompanying persons, taking part in your project's transnational activities. Details of each participant will have to be input onto the Mobility Tool+ and the eligible grant amount will be automatically calculated by multiplying the number of days/months per participant with the applicable unit contribution applicable, as specified in Annex III of your grant agreement.

Individual Support costs will only be eligible if participants actually undertook the activity abroad and, to demonstrate this, you must keep for each participant a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the activity and the dates within which the activity took place.

Linguistic Support

Linguistic Support is a contribution to the costs you and your partners may incur to support participants in long-term transnational activities abroad for more than 2 months.

On the Mobility Tool+ you will need to report which participants received linguistic support and you will be allowed to claim €150 per participant receiving this type of support. You will need to retain supporting documents in the form of proof of attendance to any language courses, invoices for the purchase of learning materials or a declaration signed by the participant, if the partner organisations delivered the linguistic support themselves. Please see Article II.16.2.5 of your grant agreement for further details.

If you did not originally apply for Linguistic Support, you may only transfer budget to accommodate Linguistic Support when the project has transnational Training, Teaching and Learning activities

which are two months or longer in duration, specified within Annex I of the grant agreement. Please note that any budget transfers must be made in line with the requirements set out in Article I.3.2 of your grant agreement

Supporting Participants with Travel, Individual support and Linguistic Support

Support for Travel, Individual Support and Linguistic Support can be provided to participants as:

1. Full transfer: full funds are transferred to participants, who make suitable arrangements.
2. Contribution in kind: the organisation makes suitable arrangements on behalf of participants.

You may combine options 1 and 2 so far as you ensure fair and equal treatment of all participants. In such cases, the conditions applicable to each option will be applied for the budget categories to which the respective option is applied.

7.8 Documents to be Retained

You must set up an appropriate accounting system which identifies all sources of funding and expenditure relating to the project incurred during the contract period.

Throughout the project lifecycle you must ensure you have clear financial reporting mechanisms in place to manage your Erasmus+ grant.

You won't need to submit evidence of all expenditure at the reporting stage; however, you will need to confirm that the activities you are claiming costs for actually took place. You will also be required to manage and report on your project finances via the Mobility Tool+.

The UK NA advises you to retain financial records and supporting documents for all costs incurred in the project, in case of checks and audits by the UK NA or the European Commission. These can occur up to five years after the payment of the balance of your project's grant or three years in case the maximum grant amount awarded to your project is not more than €60,000. Documents need to be kept for the specified period starting from the date when your project received its balance payment. The only exception to these requirements is where a longer duration is required by national law.

As a minimum, you will need to collect and keep the documents specified in Articles II.16.2.5 (calculation of unit contributions) and II.16.4.4 (calculation of actual costs) of the grant agreement,

according to each individual budget heading, as they may be requested in the event of checks and audits.

Other examples of financial records and supporting documents that should be retained include:

- as per Article II.1.3, bank transfer documents showing payments have been made to partners. This should be official documents from your bank, not internal requests for payment, showing the date and amount transferred and clearly stating the partner's organisation name;
- travel tickets and boarding passes for journeys charged to the project;
- summary of organisations' subsistence, depreciation and VAT policies.

As per Article II.20.2 of the grant agreement, you need to keep all original documents stored on any appropriate medium. This includes digitalised originals if they are authorised by the relevant national law.

7.9 VAT

Value Added Tax (VAT) is an eligible cost only if it is not recoverable under the applicable national VAT legislation, with the exception of activities or transactions in which states, regional and local government authorities and other public bodies engage as public authorities.

In addition:

- deductible VAT not actually deducted due to national conditions or to the carelessness of beneficiaries is not eligible; and
- VAT Directive does not apply to non-EU countries.

In all cases, VAT can be included in the project's financial accounts if it represents a final charge, i.e. it is non-refundable. In the event that you need to claim VAT, you will be asked to demonstrate that you are not able to claim this back through your own organisation.

7.10 Budget Transfers

Article I.3.2 outlines strict conditions which projects must adhere to when making transfers between budgets. Any changes which do not comply with these conditions will constitute as a significant change to the project which must, therefore, be submitted as a request to the UK NA. Significant

changes to projects' budgets will only be approved in exceptional circumstances. For more information, please see section 4.2 of this document.

As per Article I.3.2, the budget headings Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities can be increased up to a maximum of 20% of the amounts awarded to each.

Projects can transfer up to 20% of the funds allocated **from** any of the above budget headings. However, Project Management and Implementation and Exceptional Costs **can not be** increased under any circumstances.

Projects can also transfer funds from any budget category to Special Needs Support, even if no funds has previously been allocated to this budget heading (zero value).

Please refer to Annex II of your grant agreement for the approved amounts for each budget heading.

Table 2 below outlines the budget amendments which can be made in accordance to Article I.3.2.

Budget from	Budget to	Maximum % which can be vired
Project Management and Implementation	Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Transnational Project Meetings	Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Intellectual Outputs	Transnational Project Meetings, Multiplier Events, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Multiplier Events	Transnational Project Meetings, Intellectual Outputs, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Transnational training/teaching/learning Activities	Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Special Needs Support	20% Special Needs Support: 100%
Special Needs Support	Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities	0%

Exceptional costs	Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Learning, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
-------------------	--	------------------------------------

Table 2 – Budget Transfers

When transferring into eligible budget headings, the budget heading receiving the additional funding cannot increase by more than 20% of the amount awarded in Annex II. The exception to this rule applies to Special Needs. Transfers into the Special Needs budget will only be eligible however if the project has approved Training, Teaching and Learning Activities. Projects can transfer funds into Special Needs even if the awarded grant is zero. Under no other heading may transfers occur to a budget heading of zero.

7.11 Ineligible Expenditure

As per Article II.16.5 of the Grant Agreement, in addition to costs not fulfilling conditions specified in sections 7.1 through to 7.10 of this document, certain types of expenditure will be considered ineligible, namely:

- return on capital;
- debt and debt service charges;
- provisions for losses or debts;
- interest owed;
- doubtful debts;
- exchange losses;

- costs of opening and operating bank accounts, including costs of transfers from the UK NA charged by the bank of the beneficiary;
- costs declared within another project receiving a grant from EU budget, including grants awarded by a Member State and financed from the Union budget and grants awarded by other bodies than the Commission for the purpose of implementing the Union budget); in particular, indirect costs shall not be eligible under a grant for a project awarded to the beneficiary when it already receives an operating grant financed from the Union budget during the period in question;
- in the case of renting or leasing of equipment, the cost of any buy-out option at the end of the lease or rental period;
- contributions in kind from third parties;
- excessive or reckless expenditure; and
- VAT, when it is recoverable under the applicable national VAT legislation.

7.12 Exchange Rates

Please note that the UK NA will make all grant payments in Euro.

You are strongly advised to set up a Euro bank account as costs incurred as a result of exchange rates will not be covered by the grant.

For projects that received a pre-financing payment, to convert any costs incurred in currencies other than Euro, as per Article I.4.6 of the grant agreement, you should use the monthly exchange rate established by the Commission and published on its website (http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm) on the day you received your pre-financing payment from the NA. You must use these exchange rates until the date of the next pre-financing payment, where the same process applies.

For projects without pre-financing, you should use exchange rates based on the monthly accounting rate established by the Commission and published on its website (http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm) applicable on the day when the agreement is signed by the last of the two parties. You should use these rates until the end of your project.

8. Payment Arrangements

Article I.4 of the grant agreement sets out the payment arrangements that apply to your project, including the amounts, conditions and timescales for all pre-financing payments. The first pre-financing payment will be made no later than 30 days after the grant agreement has been signed by both the UK NA and the beneficiary.

KA2 Strategic Partnership projects may be required to submit an Interim Report, and in some cases a Progress Report, to the UK NA by the dates specified in your grant agreement.

In the event that your project is subject to submit a Progress Report or Interim Report, you need to demonstrate that the project is being delivered in line with the approved grant application. You will also need to demonstrate that, as a partnership, you have spent at least 70% of the previous pre-financing payment received from the UK NA.

Where the Progress or Interim Report shows that less than 70% of the previous pre-financing payment has been spent, the Coordinator will be required to submit a further report once the required spend can be demonstrated. This additional report will be considered as the request for the next pre-financing payment, which the UK NA will pay within 60 calendar days of the receipt of the report, provided the report is assessed as satisfactory.

The final payment for the project will be made within 60 days calendar days of receipt of a satisfactory Final Report and its associated documentation to the UK NA.

Please note that projects which are subject to a zero pre-financing payment structure will not receive any funds during the lifetime of the project. Funds will be released within 60 calendar days of receipt of a satisfactory Final Report and its associated documentation to the UK NA. Progress and Interim Reports will still be required as outlined in Article I.4.2 of the Grant Agreement.

9. Progress Report

A sample of KA2 projects will be required to submit a Progress Report to the UK NA. Article I.4.2 outlines the reporting requirements for your project.

If your project is required to submit a Progress Report the UK NA will issue a report template for your completion. The report template will be made up of a qualitative and financial section which will be used to assess the extent to which your project is being delivered in line with your original application.

Once the UK NA has assessed your Progress Report, you will receive feedback along with confirmation regarding your next pre-financing payment.

10. Interim Report

All KA2 projects with a project duration of two years or longer are required to submit an Interim Report. Article I.4.2 outlines the reporting requirements for your project.

Under the 2015 Call, the Interim report will need to be submitted via the Mobility Tool+. Further guidance on how to download, complete and submit your Interim Report via the Mobility Tool+ will be produced once the tool and report forms are released by the European Commission.

Your Interim Report will be made up of a qualitative and financial section which will be used to assess the extent to which your project is being delivered in line with your original application. Once the UK NA has assessed your Interim Report, you will receive feedback along with confirmation regarding your next pre-financing payment.

Further information regarding the quality criteria and the scoring applicable to Interim Reports will be provided once further details have been released by the European Commission.

11. Final Report

All Coordinators will be required to submit a Final Report within 60 days of their project end date, as specified in the grant agreement.

Under the 2015 Call, Coordinators will need to complete a Final Report via Mobility Tool+ on the implementation of the Project, and upload all project results onto the Erasmus+ Project Results Platform as specified in Article I.10.2.

(Further guidance on how to download, complete and submit your Final Report via the Mobility Tool+ will be produced once the tool and report forms are released by the European Commission.)

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 delivered in line with your original application. Once the UK NA has assessed your Final Report, you will receive feedback along with confirmation of the amount of any final payment due to you or any refund due to the UK NA.

The Final Report will be assessed on the basis of set quality criteria and scored out of a maximum 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.

The Final Report will be assessed using a common set of quality criteria focussing on:

- the extent to which the project was implemented in line with the approved grant application;
- the quality of activities undertaken and their consistency with the project objectives ;
- the quality of the products and outputs produced;
- the learning outcomes and impact on participants;
 - The extent to which the project proved to be innovative/complementary to other initiatives
 - The extent to which the project implemented effective quality measures as well as measures for evaluating the project's outcomes
- the impact on the participating organisations;
- in the case of Training, Teaching and Learning activities: 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;
- the quality and scope of the dissemination activities undertaken, and
- the potential wider impact of the project on individuals and organisations beyond the beneficiaries.

As per Annex III of your grant agreement, your final grant amount will be reduced for poor, partial or late implementation of the project. Reductions will be applied to the final total of eligible costs on the following basis:

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

If you fail to submit your Final Report by the deadline, the UK NA will send you a formal reminder within 15 calendar days of the deadline. If you still fail to submit the report within 30 days of this reminder, the UK NA may terminate the agreement and request a full refund of any pre-financing payments made to date.

12. More Help and Advice

Your Project Officer is your first point of contact at the UK NA for any queries regarding your KA2 project. You can contact them directly via the contact details they have provided.

If you have an urgent query or your Project Officer is not available, you can also contact the Erasmus+ Helpline on 0121 212 8947 or email erasmusplus@ecorys.com and a member of the wider team will respond. Our office hours are Monday to Thursday 09:00 - 17.30 and Friday 09:00 - 17:00. You can expect a response from us within two working days.

You can also visit the 'Project Support' page of our website here: <https://www.erasmusplus.org.uk/project-support> which will be updated on an ongoing basis with useful resources, guidance and examples of best practice to help you manage your KA2 project.