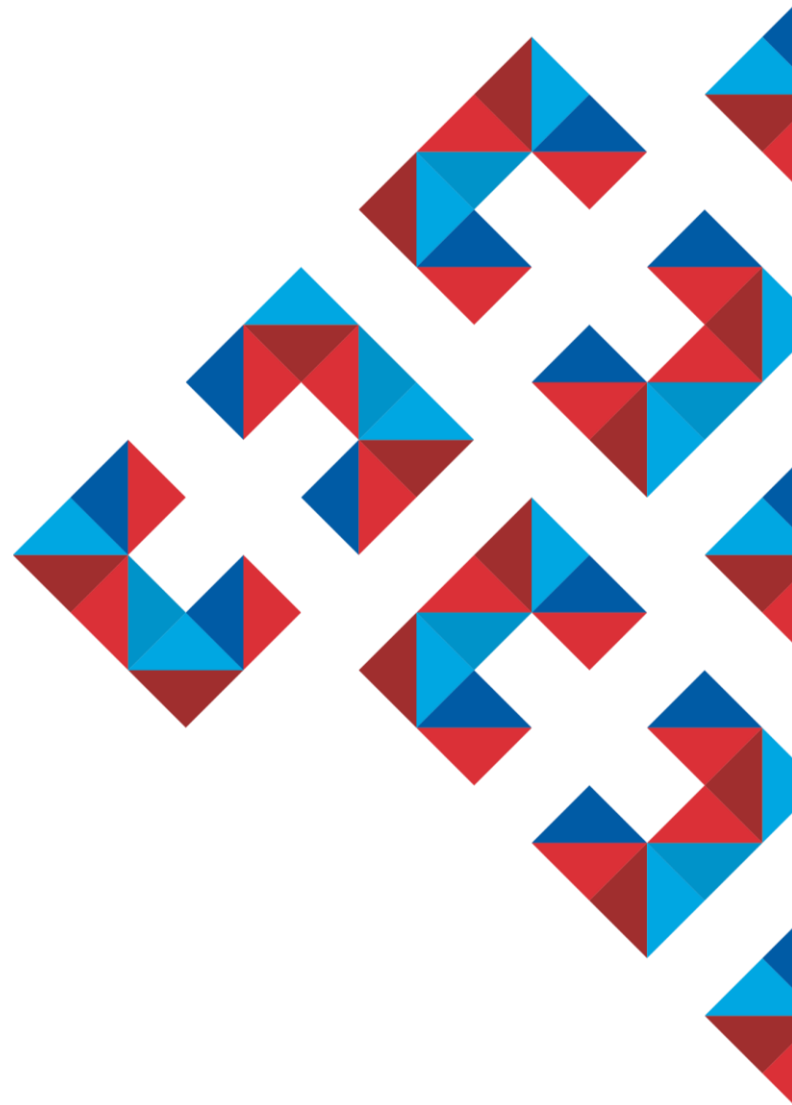


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CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

Key Action 2: VET and AE 2019 Call Start-up Webinar



Purpose of the Seminar

- Go through stages of the project lifecycle
- Strengthen understanding of rules and requirements of the Erasmus+ Key Action 2
- Enhance communication between beneficiaries and the National Agency / Project Officers

Morning Agenda

- 10:00** Welcome and Introduction
- 10:20** Managing your Grant
- 11:20** Role of the Project Officer,
- 11:35** Monitoring your Project
- 12:00** Close

Afternoon Agenda

- 14:00** Using Mobility Tool+
- 14:30** Reporting on your Project
- 15:05** Supporting documentation
- 15:20** Dissemination, Evaluation and Impact
- 15:40** Q&A
- 16:00** Close



About the UK National Agency

Role of the UK National Agency

- To promote the Erasmus+ programme in the UK
- To provide information, advice and guidance
- To manage project assessment and selection
- To make payments to projects and conduct audits
- To undertake monitoring of projects
- To disseminate and exploit results

Role of the Beneficiary

- Responsible for project implementation
- Ensures a strong, committed partnership is in place
- Ongoing monitoring and evaluation of all aspects of a project
- Dissemination of results
- Reporting

Erasmus+ and Brexit

- The UK NA is working closely with the Department for Education.
- All existing Erasmus+ and ESC projects that have a contract to deliver funded activities are advised to continue to do so.
- UK applicants with successful Erasmus+ and European Solidarity Corps bids will be able to claim against the HMG Guarantee.
- On 19 March 2019, the European Council and Parliament adopted the Erasmus+ Contingency Regulation.

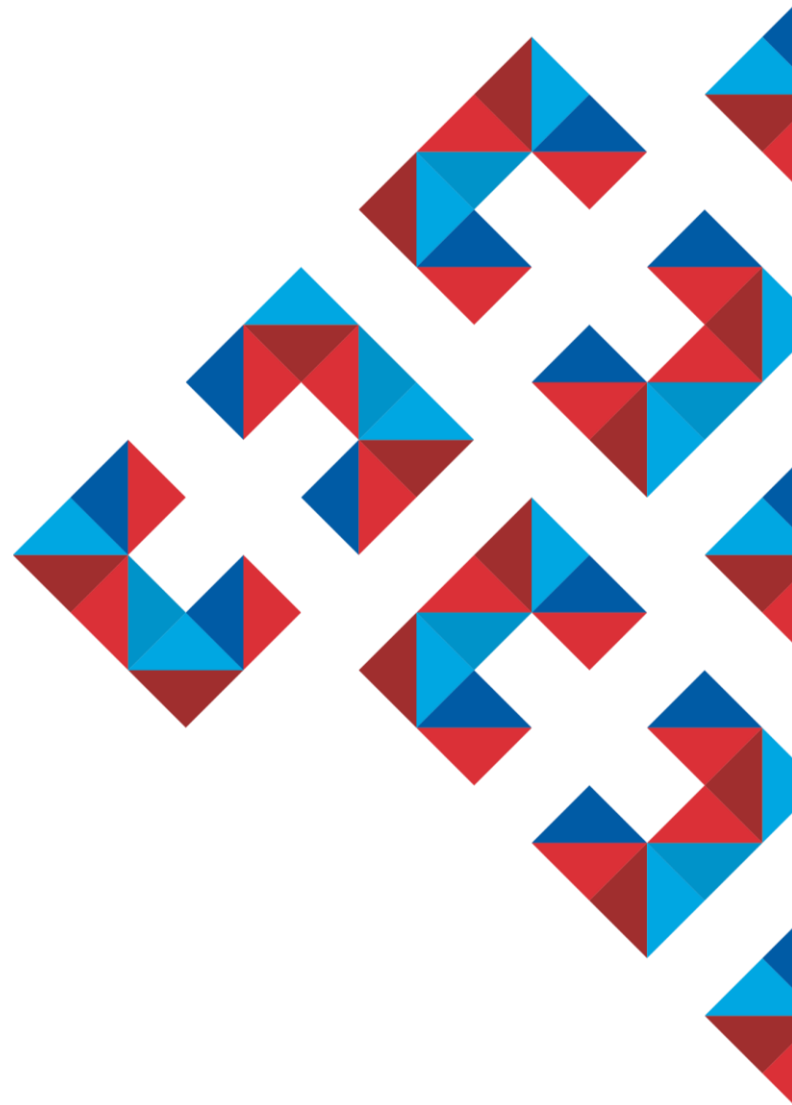
erasmusplus.org.uk/Brexit-update

- 2020 Call has been published

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Managing your Grant



Overview

- Grant Agreement
- Annexes
- Contract Amendments



Grant Agreement

Grant Agreements

Type:

- *Multi-beneficiary agreements*

All partners of the consortium become beneficiaries of the agreement!

Structure:

- Special Conditions
- Annexes

Grant Agreement Annexes

Annexes:

- Annex I: General Conditions
- Annex II: Description of the Project; Estimated budget of the project; List of other beneficiaries
- Annex III: Financial and Contractual rules
- Annex IV: Applicable Rates
- Annex V: Partner Mandates
- Annex VI: GDPR

Special Conditions

Specific Articles of the Grant Agreement

Article I.3.3 – Budget Transfers

- Not considered as a formal amendment to the Grant Agreement.
- Transfers of up to 20% between all budget categories except Special Needs Support.
- Transfers of up to 20% between all budget categories except Project Management and Implementation and Exceptional Costs budget headings as these cannot be increased.

Article 1.4 – Reporting and Payments

- Reporting deadlines and requirements
- Timescales and conditions for payment
- 1st pre-financing payment within 30 days of signed grant agreement
- Payment of the balance/refund within 60 calendar days on receipt of the Final report

Article I.8 - Use of Results and IPR

Article II.9 – Pre-existing Rights and Ownership

Beneficiaries own rights to project results but are required to:

- Provide free, open, online access to educational materials produced under the scope of the Project.
- List all rights of ownership, including any pre-existing IPR, and disclose the list to the National Agency
- Ensure you have all the rights to use any pre-existing IPRs
- Grant the Union and the NA the right to use the results of the project and any pre-existing IPR

Article I.XX – Additional Provisions Required by National Law

Beneficiaries are expected to follow these policies throughout the lifetime of the project:

- Equal Opportunities
- Protection of Children and Vulnerable Adults
- Health and Safety

Article I.XX – Supporting Participants

Beneficiaries can provide support for: travel, linguistic support and individual support, as approved, for participants in two ways:

- 1. Full transfer:** the beneficiary transfers the full unit contributions as specified in Annex III to the participants to make suitable arrangements
- 2. Contribution in kind:** the beneficiary makes suitable arrangements on behalf of the participant

General Conditions Specific Articles of the Annex I

Article II.2 Obligations and Roles

Beneficiaries must:

- Make internal arrangements to ensure the successful delivery of the project, e.g. partnership agreements
- Keep the coordinator informed of any changes or issues that could impact on delivery

Coordinator must:

- Ensure the project is implemented in line with the terms of the Agreement
- Be the intermediary between the beneficiaries and the NA
- Provide all necessary documents in the event of checks or audits
- Payments to the partners

Article II.8 Visibility of Union Funding

- Beneficiaries are obligated to acknowledge the contribution of the European Union programme funding
- Example of standard text for a Disclaimer: "This publication has been produced with the support of the Erasmus+ Programme of the European Union. The contents of this publication are the sole responsibility of <name of the beneficiary> and can in no way be taken to reflect the views of the NA and the Commission"
- Guidance on the use of the Erasmus+ emblem:
<https://www.erasmusplus.org.uk/promotion-and-dissemination>

Article II.16 Suspension of the Implementation of the Action

- Suspension of the project can be initiated by either the NA or the beneficiary, in the circumstances outlined in the agreement
- Either party must formally notify the other, explaining the reasons and the conditions/likely timescales for resuming the project
- Costs incurred by beneficiaries during suspension period will not be reimbursed or covered by grant

Article II.17 Termination of the Agreement

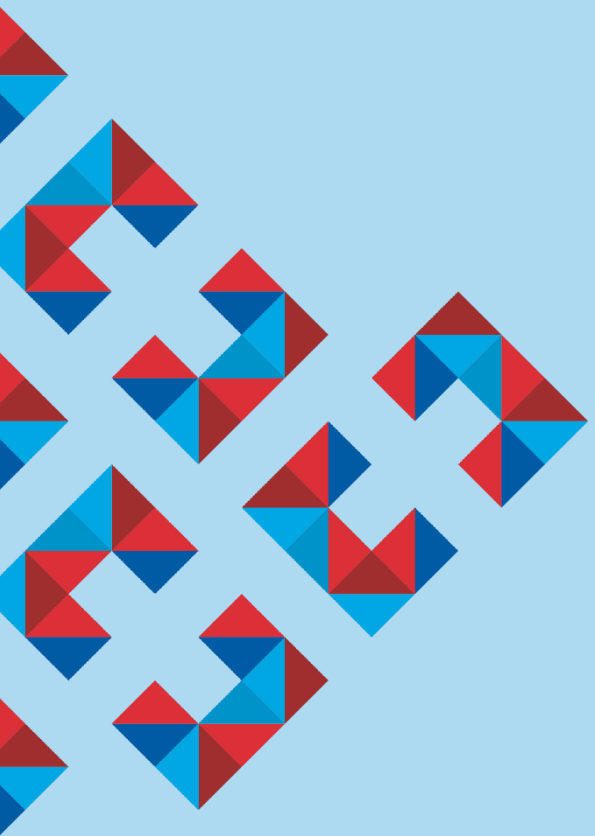
- Termination of the project or of one or more beneficiaries can be initiated by either the NA or the coordinator
- Any request for termination by the coordinator must be duly justified and accepted by the NA
- If the NA decides to terminate the agreement, the coordinator will be formally notified and can submit observations
- If the NA decides to pursue the termination, the coordinator will be advised of the reasons, the date of termination and the effects/any action required

Article II.27 Checks, Audits and Evaluations

- Beneficiaries subjected to Technical and Financial checks or audits in relation to the use of the grant. *(by NA, EC, mandated bodies, OLAF)*
- Beneficiaries obligated to keep documents for:
 - 5 years if grant amount more than €60,000
 - 3 years if grant amount not more than €60,000

Things to consider

- Partners, roles and responsibilities
- Develop good internal monitoring system
- Managing participants (*For training, teaching and learning activities only*)
- Financial and Contractual Rules Annex III
- KA2 Handbook
- Contact your PO in case of any queries



Contract Amendments

Amendments to the Agreement

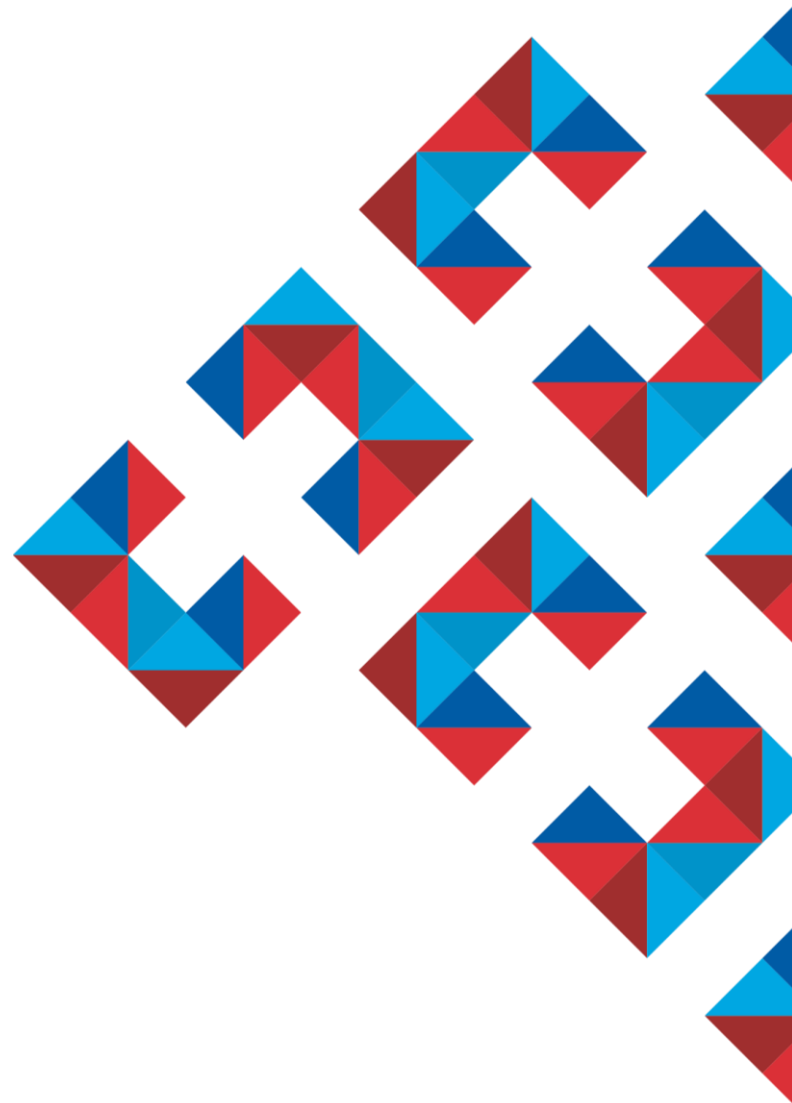
Amendments can be broken down into 2 categories

Minor change request	Significant change request
Change of contact person	Change of organisation name
Change of legal signatory	Withdrawal of partner
Change of bank details	Partner replacement
Change of address	Change to the work programme and/or budget

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Budget Transfers



Budget Transfers

- Beneficiaries are permitted to transfer funds between certain budget headings without seeking NA approval by applying the 20% rule
- You must record the additional activity in MT+ to calculate the new overall budget

Budget Transfers – 20% Rule

- You can move up to 20% of approved funding under the following budget headings...
- Project management and implementation, Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Learning/teaching/training activities and Exceptional costs
- ...to the following headings, only if the transferred amount does not exceed 20% of the approved funding under the budget heading to which funds are being transferred
- Transnational Project Meetings, Intellectual Outputs, Multiplier Events and Learning/teaching/training activities

Maximum % transfer from	Budget to	Maximum % transfer to
Project Management and Implementation 20%	Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Transnational Project Meetings 20%	Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Intellectual Outputs 20%	Transnational Project Meetings, Multiplier Events, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Multiplier Events 20%	Transnational Project Meetings, Intellectual Outputs, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%
Transnational training/teaching/learning Activities 20%	Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Special Needs Support	20% Special Needs Support: 100%
Exceptional costs 20%	Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Learning, Transnational Training, Teaching and Learning Activities, Special Needs Support	20% Special Needs Support: 100%

20% Rule Example

- Transnational Project Meeting (TPM) budget = €5,175, TPM underspend = €1,150
- Max amount that can be transferred out of TPM = $€5,175 \times 20\% = €1,035$
- TPM underspend is more than 20% TPM approved budget. Therefore, the max amount that can be transferred out is 20% TPM approved budget = €1,035

- Multiplier Event (ME) budget = €700
- Max amount that ME approved budget can be increased by = $700 \times 20\% = €140$
- No of additional delegates = $1 \times \text{local participant} = 1 \times €100 = €100$
- 20% TPM approved budget that can be transferred to ME budget = €100

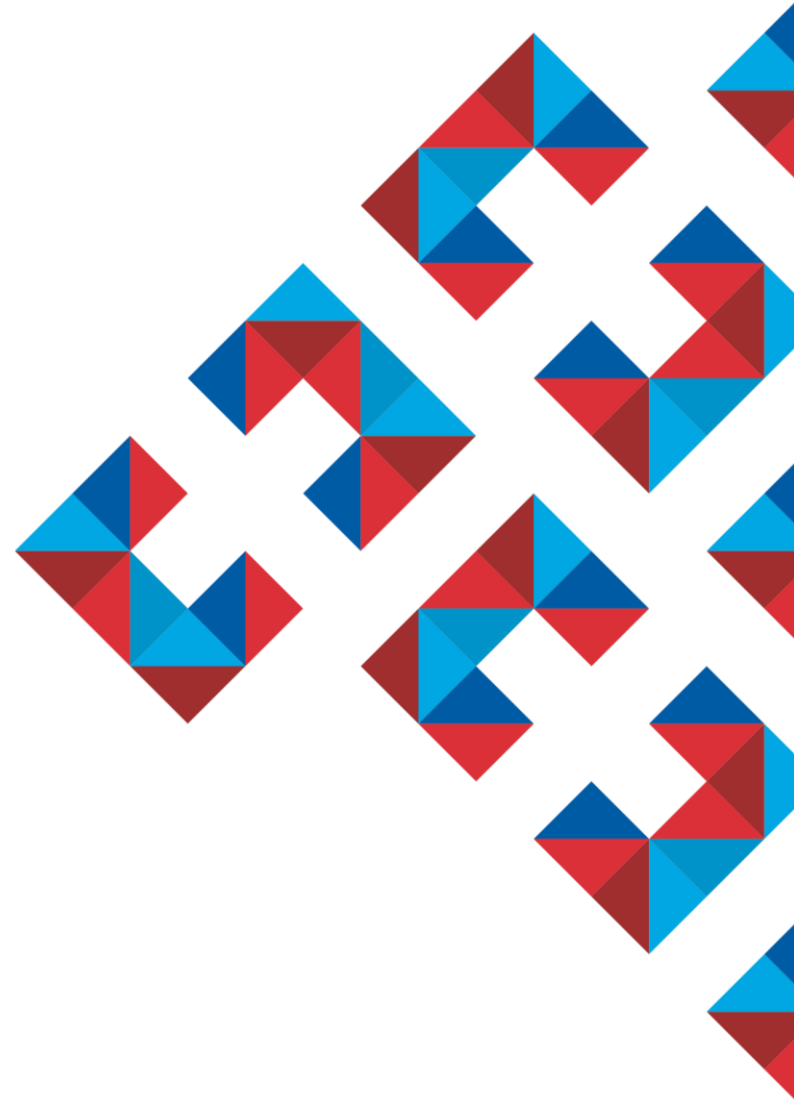
Other budget transfers

- Please be reminded that any other change to the budget composition, that falls outside of the 20% budget rule will require a formal contract amendment
- Any significant change to the project must be approved in advance by the UK NA
- Significant changes to projects' budgets will only be approved in exceptional circumstances and where justified

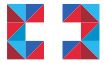
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Role of the Project Officers



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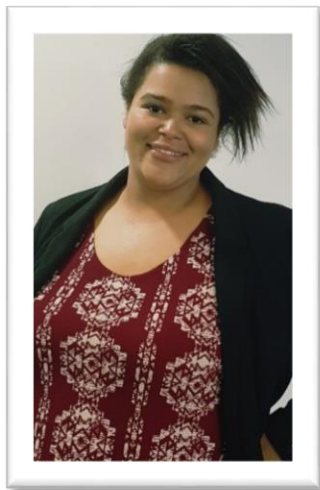


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Project Officers at the NA



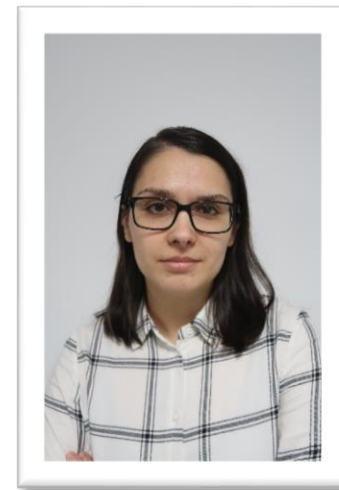
Stephen Green



Zoe Dyson Falconer



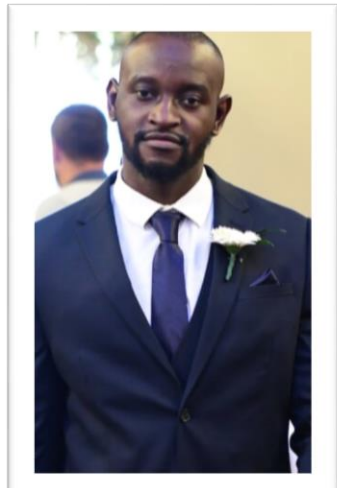
Indre Zeimyte



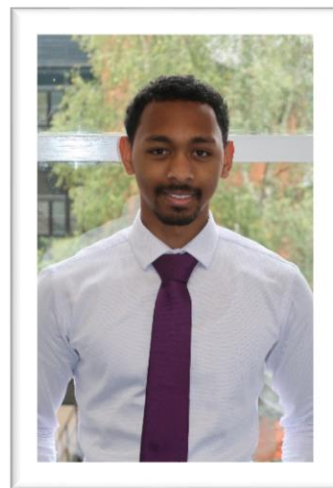
Natalia Boron



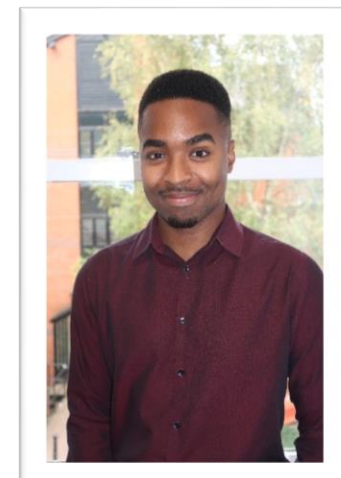
Rachil Kotidi



Farai Maphosa



Immanuel Gordon



Jay Welter

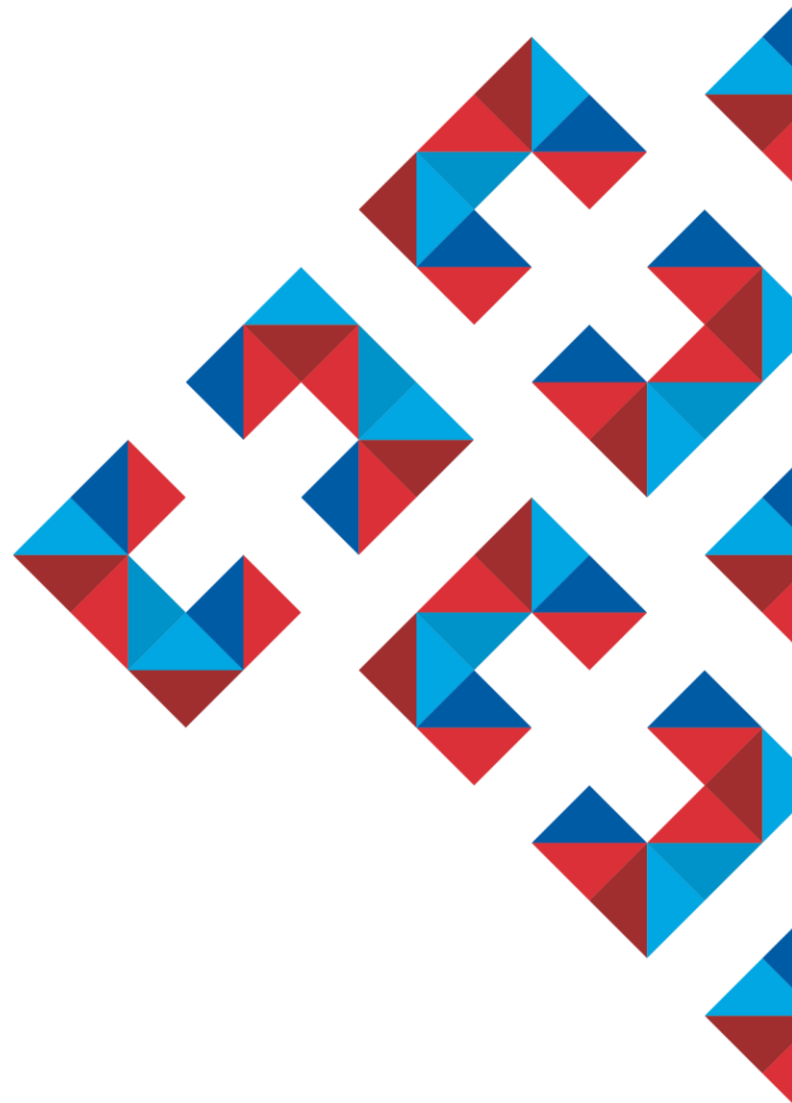
Project Officers' work at the NA

- We are actively involved in the promotion of the Erasmus+ Programme throughout the year, including attendance at the conferences and events
- We are the helpline team
- We undertake a range of the monitoring activities
- We are involved in every part of the Erasmus+ application journey: eligibility checks, validations, supporting our external assessors, contracting
- We assess progress and interim reports, as well as undertaking financial validation of final reports

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Monitoring of your project



Overview of Monitoring

National Agency monitoring:

- Via Mobility Tool+
- Via Monitoring calls & emails
- Via Monitoring visits, checks & audits

Your responsibilities:

- Constant project monitoring
- Ongoing project evaluation
- Updating Mobility Tool+ on ongoing basis

Monitoring Calls

- Sample of projects
- Monitor project progress against original objectives, activities and outputs
- Provide advice and support
- Identify case studies and identify good practices to promote your project and the Erasmus+ Programme

Monitoring Visits, Checks & Audits

- Monitoring Visits
- On the Spot Checks – during or after project lifetime
- Audit Visits

Monitoring Visits

- Sample of projects
- Review project progress against original objectives, activities and outputs
- Provide support and identify good practices to promote your project and the Erasmus+ Programme
- Cover key areas of the project implementation

On the Spot Checks during project lifetime

- Random sample of projects
- Can be combined with a Monitoring visit
- Checks on the reality, eligibility and quality of project activities

Checks and Audits

- A sample of projects will be selected for additional checks and audits
 - Final report check
 - Desk check
 - On-the-spot check during action
 - On-the spot check after action
- Checks involve a financial review on project activities
- For checks and audits the coordinator must supply supporting documents, including supporting documents for partners