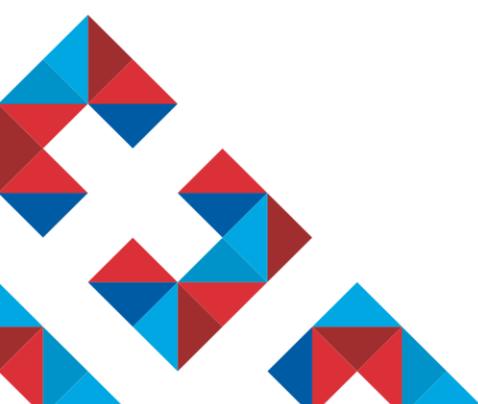


2017 Key Action 2 Handbook

For KA2 Strategic Partnerships in VET and Adult
Education

Version 2.0



My project officer:.....

E-mail address:.....

Number:.....

My reporting dates

Progress report due: .../.../.....

Interim report due: .../.../.....

Final report due: .../.../.....

Mobility Tool+

Username:.....

Password:.....

Erasmus+ Project Results Platform

Username:.....

Password:.....

Overview of Changes

This document is **version 2** of the 2017 Key Action 2 (KA2) Handbook for Strategic Partnerships in the field of Adult Education and VET. 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	Date change made
Page 10	Correction to eligible duration of short-term joint staff training events.	Page 10	19/01/2018

Contents

1. Introduction.....	6
2. Background	7
2.1 The Erasmus+ Programme	7
2.2 Key Action 2 Strategic Partnerships	7
2.3 Activities	7
3. Contracting Process	10
3.1 Grant Agreement and Annexes	11
3.2 Changes to Grant Agreements.....	13
4. Payment Arrangements	15
5. Managing your project	16
5.1 Quality Assurance	16
5.2 Roles and Responsibilities	18
5.3 Mobility Tool+	20
5.4 Recognition and Validation of Learning	21
5.5 Evaluation	22
5.6 Dissemination and Exploitation of Results	22
6. National Agency Monitoring	26
6.1 Project Officers.....	27
6.2 Monitoring Calls.....	27
6.3 Monitoring Visits	27
7. National Agency Checks.....	28
7.1 Record Keeping.....	29
7.2 On the Spot Checks during the Action.....	30
7.3 On the Spot Checks after the Action.....	30
7.4 Desk Checks	30
8. Financial Management.....	31
8.1 Unit Costs.....	31
8.2 Actual Costs	33
8.3 Project Management and Implementation	34
8.4 Transnational Project Meetings	34
8.5 Intellectual Outputs.....	36
8.6 Multiplier Events	37
8.7 Special Needs Support.....	38

8.8	Exceptional Costs.....	39
8.9	Transnational Training, Teaching and Learning Activities.....	40
8.10	Documents to be retained	43
8.11	VAT.....	44
8.12	Budget Transfers.....	44
8.13	Ineligible Expenditure	46
8.14	Exchange Rates.....	46
9.	Reporting to the National Agency	47
9.1	Progress Report	47
9.2	Interim Report.....	48
9.3	Final Report.....	48
10.	More Help and Advice	50
11.	Glossary	51
	Annex I: Example Supporting Document Templates	57

1. Introduction

The 2017 KA2 Handbook for Key Action 2 (KA2) Strategic Partnerships in VET and Adult Education is designed to help UK beneficiaries with the management of their 2017 KA2 project. The information contained in this document aims to supplement that provided within your **Grant Agreement, Annexes and the 2017 Programme Guide**, as well as acting as a quick reference point for common queries and procedures. Please ensure that you still refer to these key documents regularly throughout the life of your project to ensure you are managing your grant in accordance with the 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 may be subject to change throughout the course of the programme. Changes will be recorded on page 3 of this document, and the most up to date version will be found on our website at: <https://www.erasmusplus.org.uk/manage-your-grant>.

2. Background

2.1 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.

2.2 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. This document is relevant to KA2 Strategic Partnerships in the fields of Vocational Education and Training (VET) and Adult Education (AE). KA2 projects are flexible and can involve a range of different activities depending on the objectives and composition of the projects. These can be either Strategic Partnerships supporting innovation or Strategic Partnerships supporting exchange of good practices. Both include transnational project meetings and can also involve transnational training, teaching or learning activities, provided these activities contribute to achieving the overall objectives of the project. Strategic Partnerships supporting innovation can additionally request a dedicated budget for Intellectual Outputs and Multiplier Events in order to directly address the innovation aspect of the project.

KA2 Strategic Partnerships are open to organisations from both Programme and Partner Countries ([Programme Guide, pg. 21-24](#)). However, when involving organisations from Partner Countries their essential added value to the project must be clearly demonstrated at application stage. There are also some restrictions on activities involving partners from Partner Countries. Please refer to the [2017 Call Programme Guide](#), pg. 127 and Annex III of your Grant Agreement for further details.

2.3 Activities

There are two types of KA2 Strategic Partnerships: Strategic Partnerships supporting innovation and Strategic Partnerships supporting exchange of practices. Depending on the type of project, Strategic Partnerships may focus more on the exchange of ideas, knowledge and practice or they may aim to develop and disseminate innovative outputs. The type of project is selected at application stage and it is important to note that your project has been approved on the basis of your grant application and 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:

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, organisation and mentoring of embedded learning/training activities;
- Smaller-scale information, promotion and dissemination activities (e.g. brochures, leaflets, website).

Transnational Project Meetings

These are meetings between the project partners to discuss the coordination and implementation of the project. The meetings must be hosted by one of the funded partner organisations in the country where they are based. If duly justified and approved at application stage, Transnational Project Meetings can also take place in the location of a seat of an Institution of the European Union, i.e. in Brussels, Frankfurt, Luxembourg, Strasbourg or The Hague, even if there are no participating organisations from the country which hosts the Institution.

Beneficiaries must demonstrate a formal link with the individuals participating in transnational project meetings; whether they are involved in the project as staff (on a professional or voluntary basis) or as learners of the beneficiary organisations.

Most KA2 projects will involve some transnational project meetings. Please note, Transnational Project Meetings are not a compulsory requirement for KA2 projects however, they are strongly recommended by the UK NA, particularly for larger and more complex projects.

Intellectual Outputs (Strategic Partnerships supporting innovation only)

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. KA2 projects supporting innovation will normally include Intellectual Outputs.

Multiplier Events (Strategic Partnerships supporting innovation only)

Multiplier Events are national or transnational conferences, seminars or events aimed at sharing and disseminating Intellectual Outputs produced (i.e. completed or at an advanced stage of development) by the project. Only projects supporting innovation and delivering Intellectual Outputs can include Multiplier Events. Multiplier Events can take place in the country of one of the organisations participating in the project or, if duly justified and approved at application stage, can also take place in the location of a seat of an Institution of the European Union, i.e. in Brussels, Frankfurt, Luxembourg, Strasbourg or The Hague, even if there are no participating organisations from the country which hosts the Institution. Multiplier Events can also be held in the country of any of the approved associated partners involved in the Strategic Partnership, if duly justified in relation to the objectives of the project. Should a Multiplier Event be held in the country of an associated partner, the event will still need to be hosted (i.e. organised) by a funded partner. Representatives of participating organisations involved in the project cannot claim travel and/or subsistence costs associated with unit costs per local and/or per international participants.

Eligible participants of Multiplier Events can be of two types; local or international.

- **Local** participants are from the country in which the event is taking place.
- **International** participants are from other countries.

Representatives from the participating partner organisations attending the event **cannot** be counted as eligible participants for the purpose of calculating the unit costs.

Training, Teaching and Learning Activities

Some KA2 projects may also include Training, Teaching and Learning activities, where these bring essential 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 mobility of learners: This is where VET or adult education learners from the partner organisations work together using ICT tools such as social media, video conferencing or live streaming, in addition to physical meetings. The physical meetings can last for 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. Learner mobilities to or from Partner countries are not eligible.

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

Long-term teaching and training assignments: This is where VET or adult education staff from the participating organisations either teach or work alongside other staff in a VET or adult education organisation. 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 twelve months, excluding travel days. Long-term activities to or from Partner countries are not eligible.

You will be expected to deliver the project activities and outputs outlined in your application form and approved in your Grant Agreement and Annexes I - IV. You must 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 or as per an approved contract amendment (more information on contract amendments can be found in section 4.2 of this document) your final approved grant amount may be reduced by the UK NA at final report stage.

3. Contracting Process

Following the assessment and selection process, all successful beneficiary organisations are required to sign a grant agreement (contract) with the UK NA.

Before commencing any funded project activity you must have a signed grant agreement 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 grant 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 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.

3.1 Grant Agreement and Annexes

The KA2 grant agreement is a **multi-beneficiary grant agreement**, which means that all partners in the consortium are co-beneficiaries to the agreement. The grant recipient is referred to as the Coordinator within the grant agreement. The grant agreement includes a number of annexes.

It is very important to **read your grant agreement and all the annexes** carefully and to ensure that your partners are familiar with them. You must ensure that you and your partners comply with the terms of the grant agreement and annexes throughout the life of your project.

The term ‘the Commission’ in your grant agreement must be read as ‘the NA’, the term ‘action’ must be read as ‘project’ and the term ‘unit cost’ must be read as ‘unit contribution’, except where otherwise provided.

Your grant agreement includes the following documents:

Special Conditions of the Grant Agreement

The Special Conditions includes some important information which is specific to your project, including the start and end dates, project name, grant awarded, reporting deadlines, bank account details, contact details and grant payment structure. The Special Conditions also includes a list of specific derogations from Annex I General Conditions, which you must read carefully.

Annex I: General Conditions of the Grant Agreement

The General Conditions form Annex I and should be read in conjunction with the Special Conditions of the grant agreement. For your KA2 project you must refer to the **Multi-beneficiary** Annex I, accessible via the link in your Grant Agreement. Annex I is divided in to two sections, the first one being 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, the requirements for checks and audits and the process for determining the final grant amount.

Annex II: Description of the Project and Estimated Budget

Annex II of the Grant Agreement consists of project details, budget summary, list of participating organisations and a breakdown of budget details per participating organisation. The maximum total grant awarded for the project is shown under Budget Summary 'Total Grant'. Annex II details any Training, Teaching and Learning activities, Intellectual Outputs and/or Multiplier Events which have been approved for funding in your project. Information in this annex is based on your application, but also takes 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 II, have not been approved for funding.

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.3.3 in Special Conditions 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 8.12 of this document.

Annex III: Financial and Contractual rules

Annex III 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 2017 KA2 Handbook; however it is your responsibility to ensure that you understand and comply with all of the requirements in the Grant Agreement. Failure to do so may result in you having to repay all or part of your grant to the UK NA. You must also ensure that your partners are aware of the requirements.

Annex IV: Applicable rates

Annex IV contains explanation and a breakdown of rates applicable for unit contributions (per country/ per distance band/ per staff category/ per participant) that apply to your project.

Annex V: Partner Mandates

Annex V contains the partner mandates from all partners approved to participate in the project.

In order to be eligible, a KA2 VET or Adult Education Strategic Partnership must always include a minimum of three organisations from three different Programme Countries. If at any time your partnership falls below the minimum required number of partners, unfortunately the project will not be able to continue and the agreement will be terminated by the UK NA. More information on agreement termination can be found in Annex I, General Conditions, Article II.17.

3.2 Changes to Grant Agreements

Your 2017 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 changes until you have received written approval 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 sent to your NA Project Officer. Depending on the nature of the request, your Project Officer may ask you to complete or provide certain supporting documents. Requests for amendments 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 NA will respond to your request within 45 days of receiving all the correct documentation. Minor changes will be processed more quickly. Where necessary, the UK NA may need to request additional documents or further clarification in order to support your request. In such cases the timescales for approving the request will be suspended and will resume from the date on which all the required, correctly completed, documentation has been received.

Before approving any significant changes, the UK NA will need to be satisfied that the changes will not:

- Affect the eligibility of the project (i.e. that it will still have the required 3 partners from 3 different programme countries)
- Affect the ability of the project to achieve its overall objectives and core activities;
- Call into question the original grant award decision.

The UK NA will also need to check that any proposed redistribution of the project budget has been calculated correctly and is in line with programme rules. It will not be possible to approve more than the original grant awarded following an amendment to the agreement.

Changes cannot be approved retrospectively. Requests must be received by the UK NA in good time and **at least one month** before the end of project activity, in accordance with European Commission guidance. You must therefore ensure that your project is on track and no changes need to be made at this late stage.

Please refer to Annex I, General Conditions, Article II.13 of your Grant Agreement for further information on contract amendments.

Table 1 below provides details of the requests that are deemed minor, significant or are not eligible.

Change Requested	Permitted		Not Permitted
	Minor change	Significant change	
Contact person	✓		
Legal representative	✓		
Bank details	✓		
Beneficiary organisation address	✓		
Partner organisation details (address, personnel, etc.)	✓		
Project activities	✓	✓	
Partner withdrawal		✓	
Replacement partner		✓	
Budget changes not covered by budget transfers ¹		✓	
Participating countries		✓	
Project start and end dates		✓	
Project duration		✓	
Beneficiary organisation name		✓	
Beneficiary organisation legal status		✓	
New additional partner			✓
Replacement beneficiary organisation (i.e. Coordinator)			✓

¹ 2017 Key Action 2 Grant Agreement article I.3.3

Change Requested	Permitted		Not Permitted
	Minor change	Significant change	
Reporting schedule			✓
Payment structure and schedule			✓

Table 1 – KA2 grant agreement amendments

For small changes that do not affect the objectives of your project, budget transfers allow you some flexibility to move funds between budget headings. As outlined in Article I.3.3 of your grant agreement, budget transfers fall outside the scope of contract amendments. Please note, transfers within the same budget heading do not fall under this 20% rule and may require a contract amendment to be submitted to the UK NA. An example of this would be a proposed transfer of responsibility for an Intellectual Output from one partner to another. If you are in any doubt about whether a contract amendment is required, please check with your Project Officer.

4. Payment Arrangements

Article I.4 of your Grant Agreement’s Special Conditions 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.

If your project is required to submit a Progress Report or Interim Report, you will 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. All funding calculations should be made based on the programme funding rules (i.e. unit costs or real costs, depending on the budget heading) rather than purely on the basis of actual expenditure.

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 by 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 by the UK NA. Progress or Interim Reports may still be required as outlined in Special Conditions Articles I.4.3 and I.4.4 of your Grant Agreement.

5. Managing your project

5.1 Quality Assurance

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 and in line with the terms of the Grant Agreement and Annexes.

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

- Crosschecking activities' compliance with the approved application form, grant agreement and, if applicable, any approved contract amendments;
- having a strong and committed partnership in place;
- having a partnership 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 timely monitoring arrangements in place, including referring regularly to the approved application and project work plan;
- having clear management strategies in place, with appropriate personnel responsible for managing the project;
- having clear financial reporting mechanisms and an appropriate accounting system to ensure that project expenditure is recorded appropriately;
- Having regular internal reporting from partners to the coordinator, to support project monitoring and updating Mobility Tool+ correctly;

- Regularly checking the existence and accuracy of supporting documents for all partners. This could be linked to internal reporting and payments to partners;
- linking pre-financing payments to partners to key project milestones, for example following partners' submission of activity reports and supporting documents;
- having quality control measures in place to allow you to evaluate the progress and impact of the project on an ongoing basis, ensuring 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;
- having a sustainability plan in place to ensure the project delivers ongoing impact after the EU funding has ended and;

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

- relevant preparation is provided to participants prior to the mobility activity and practical support is available throughout the period of the mobility activity;
- monitoring and mentoring arrangements are in place for participants prior to, during and after the mobility activity; and
- appropriate measures are in place to validate and recognise learning, for example using Europass, ECVET or other tools outlined in your approved application.

Projects are not required to use partnership agreements (unless this was outlined in your approved application), however the UK NA strongly recommends that these are used in Strategic Partnership projects to ensure that all parties understand their responsibilities and are committed to delivering a high quality project.

Partnership agreements can be a useful tool to formalise aspects not specifically covered within the Grant Agreement, such as internal monitoring, reporting and payment arrangements within the partnership. They can also cover aspects such as dispute resolution and quality control. Having a clear and robust partnership agreement in place can help the partnership to run smoothly and reduce risk. The provisions of the Grant Agreement and its annexes take precedence over any partnership agreement.

You can design your own partnership agreement based on the needs of your project.

5.2 Roles and Responsibilities

Article II.2 of Annex I, General Conditions, 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 reflect some of 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 and annexes;
- comply with any legal obligations outlined in the agreement;
- agree appropriate internal arrangements to ensure the proper implementation of the project;
- keep original supporting documents, including accounting and tax records, stored on any appropriate medium, including digitalised originals, for the required retention period.

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

- monitor and ensure the project is implemented in accordance with the grant agreement and, if applicable, report even a minor changes to the UK NA if possible in advance or as soon as it occurs;
- 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 or their affiliated entities;
- 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 and annexes;
- be responsible for obtaining and verifying any information required from the other beneficiaries before passing it on to the UK NA;
- make the appropriate arrangements for providing any financial guarantees required under the Agreement;
- 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;
- update the online reporting system 'Mobility Tool+' on a regular basis with accurate and up to date information;
- update the Erasmus+ Project Results Platform (E+PRP) with finalised project results; and
- comply with the UK NA's monitoring procedures upon request, i.e. a call, progress update e-mail, visit etc.

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 instalments of pre-financing and linking payments to milestones, results or 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;
- submit all necessary 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 budget management and reporting system that all Coordinators must use to manage and report on their KA2 project. 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 Progress Reports, Interim Reports and Final reports. It is therefore 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.

It is good practice for the Coordinator to verify the existence of suitable supporting documents from partners on a regular basis. This could include requesting copies of these as part of internal reporting processes. This will help to ensure that activities that are reported on Mobility Tool+ are supported by the required documents and avoid issues arising during future checks or audits. As a minimum, all partners must check that they have the required supporting documents for all activities reported and they include all the required information.

For further information, please refer to the European Commission’s online guide for beneficiaries which is available to download directly from the [Mobility Tool+ homepage](#). The online guide provides clear step by step guidance on how to update the Mobility Tool+.

The screenshot below illustrates where the Guide for Beneficiaries can be found on the Mobility Tool+ homepage:



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 and in line with the proposals in your application form:

ECVET

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/>

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 (Europass CV, the Diploma Supplement, the Certificate Supplement, the Europass Mobility and Language Passport) 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).

EPALE

EPALE, the ePlatform for Adult Learning in Europe, is a multilingual open membership community for teachers, trainers, researchers, academics, policy makers and anyone else with a professional role in adult learning across Europe. Members are invited to exchange news, views, ideas and resources (including policy documents and relevant materials produced by projects) with others throughout Europe.

For further information, please visit: <http://ec.europa.eu/epale/en>

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 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.

The UK NA has developed **Impact+ Exercise resources** to help applicants and beneficiaries think about what the impact of their projects could be and how to measure it. These are designed to be used at the start and throughout the project. The Impact+ Exercise includes a workshop guide and tools, which you can use with your partners. For further information, please visit: <https://erasmusplus.org.uk/impact-assessment-resources>

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 and training. 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;
- a project website.

Intangible results may include:

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

Annex II of the 2017 Call Programme Guide provides detailed guidance for beneficiaries on dissemination and how to showcase the achievements of your project.

The UK NA can support you to disseminate your project activities and outcomes. If you are interested in submitting a case study about your project, you can let us know via the Erasmus+ website: <https://www.erasmusplus.org.uk/share-your-erasmus-story>. Please provide as much information as possible in your expression of interest and the team will then get back to you.

There is also a Press Pack available to download from the 'Key Documents' section on the following webpage: <https://erasmusplus.org.uk/promotion-and-dissemination>

Finally, we 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>

On social media you can tag us [@erasmusplusuk](https://twitter.com/erasmusplusuk) on Twitter when sharing information about your project and use our hashtags [#epluspeople](https://twitter.com/erasmusplusuk) and [#ErasmusPlusUK](https://twitter.com/erasmusplusuk) . We will try to retweet / share any material.

Erasmus+ Project Results Platform

The [Erasmus+ Project Results Platform](#) (E+PRP) is a dissemination platform developed by the European Commission. It offers a comprehensive overview of projects funded under the programme across Europe and highlights examples of best practice. The platform is a useful tool for disseminating the outputs and outcomes of your project to a wide audience.

It is a contractual requirement for all KA2 projects to upload the outputs and outcomes of their project onto E+PRP before submitting their final report. Results can be uploaded during the project lifetime but only finalised project results, which are of good quality and relevant to an external audience should be submitted for publication. These will be reviewed by the NA as part of the final report assessment process.

When you log in using the 'Login' button on the top right, you will be prompted to input your EU Login details before being redirected to the beneficiary dashboard of the Tool.

Guidance on how to use the tool and on what constitutes a relevant result within E+PRP is available to download from the menu at the bottom of the homepage once you log in.

[DG EAC Strategy for the Dissemination and Exploitation of Programme Results](#)

[E+PRP Guidelines for Officers](#)

[E+PRP Guidelines for beneficiaries](#)

[Erasmus + Dissemination Platform](#)

[Frequently Asked Questions](#)

[Helpdesk Information](#)

[Relevant results for Erasmus+ projects](#)

The designated contact person for the project will receive an automatic notification email from E+PRP once the end date of their project has passed and results can be submitted for review by the

NA. After results have been approved by the NA, they will be published on E+PRP and will be available for public view.

You should give careful consideration to the results you submit for publication on E+PRP and ensure that they meet the requirements, are of suitable quality, and comply with rules around Data Protection and Intellectual Property rights.

Erasmus+ Emblem and Disclaimer

Projects in receipt of Erasmus+ funding (not including associated partners) must publicly acknowledge the support received from the European Union by including the European Commission's Erasmus+ emblem on all communication and promotional materials. This includes any materials or presentations used at conferences or seminars and any promotional materials. Article II.8 of Annex I, General Conditions of the grant agreement contains more information about the Visibility of Union funding. Further guidance and links to the Erasmus+ programme emblem can also be found on the Erasmus+ website: <https://erasmusplus.org.uk/promotion-and-dissemination>

Beneficiaries should not use the UK National Agency logo (as at the top of this page), nor the British Council or Ecorys UK logos on project outputs or promotional materials.

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 emblem 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. Examples of how the emblem can be displayed, are shown below:



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



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

In addition, a **disclaimer** must be added to the inner pages of any communications or publications relating to Erasmus+ funded projects to indicate that the material 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.9 of Annex I, General Conditions 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 at the application stage.

Availability of Educational Resources

Article I.8, Special Conditions of the grant agreement specifies that any educational materials produced by the project must be made available online, free of charge and under open licences. There are different open licences according to the extent of the permissions granted or the limitations imposed and the beneficiaries are free to choose the specific license to apply to their work. An open licence must be associated to each resource produced.

An open licence is not a transfer of copyrights or Intellectual Property Rights (IPR). Beneficiaries will remain the copyright holders of the materials they produce and are allowed to use them as they wish. The only requirement for grant beneficiaries is to make educational resources (or other documents and media produced by the project) freely accessible online through open licences. These licences need to at least grant use, and ideally, sharing and adaptation rights.

6. National Agency Monitoring

As Coordinator you are accountable to the UK NA for the implementation of the project, for the use of the funds received and for the amounts paid to partners. You must therefore ensure that appropriate internal reporting and monitoring procedures are put in place. Project monitoring should involve regularly checking project progress and budget expenditure against the approved application (including the timetable of activities) and the approved budget (Annex II of the grant agreement). In order to do this you will need your partners to report on the progress of the activities they are involved in on a regular basis. Effective monitoring throughout the project lifetime will help to identify any problems early on so that corrective action can be taken to ensure that the project remains on track.

The UK NA will also undertake a range of monitoring activities and checks on funded projects, to monitor progress and to ensure projects are being delivered in line with programme requirements.

6.1 Project Officers

You will be assigned a Project Officer at the UK NA to support you in delivering your project. Your Project Officer will be your first point of contact within the NA for any queries. You should keep in regular contact with your Project Officer throughout the life for your project, so that the UK NA can provide support and guidance to ensure your project is delivered successfully and in line with requirements. During the course of your project your Project Officer may ask you to provide updates about project progress and key milestones. This information should be as up to date and accurate as possible. Your Project Officer will also monitor Mobility Tool+ at intervals during the project lifetime to check that it is being updated.

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 to receive monitoring calls, 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 budget 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. 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 within a set deadline.

6.3 Monitoring Visits

The UK NA may visit your organisation during the project 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 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 approved application and grant agreement and to offer additional advice or support where necessary. It is also an opportunity for the UK NA to gather examples of good practice and to answer any questions you may have about your project.

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

Within 30 days of a monitoring visit you will be sent a draft visit report and you will have 30 days to comment on this before the report is finalised. Action points may be set as a result of the visit, which will need to be addressed within set timescales.

7. National Agency Checks

The UK NA is also required by the European Commission to undertake primary checks on a sample of organisations each year to ensure the reality, quality, eligibility and compliance of project activities, outputs and supporting documents. The majority of these checks will be selected at random, in line with European Commission requirements.

In addition to final report assessments (mentioned in Section 9.3) are three other types of checks which may be undertaken by the UK NA:

- On the Spot Checks during the Action;
- On the Spot Checks after the Action; and
- Desk checks.

7.1 Record Keeping

All beneficiaries must keep their original documents, including supporting documents, accounting/tax records and staffing records, stored in an appropriate medium, including digitalised originals where they are authorised under national law. Records must be retained for a period of five years starting from the date of the final payment. This period is limited to three years if the maximum amount of the grant €60 000 or less.

Annex III of the Grant Agreement clearly outlines the supporting documents which must be retained by each partner for each relevant budget heading. Please ensure that you and your partners are aware of the requirements and ensure they are met. Supporting documents must include all the specific information outlined in Annex III. For some budget headings you may need to keep more than one type of supporting document.

In the event of any checks or audits Coordinators will be required to supply supporting documents to the NA, including supporting documents from partners. Where original hard copy documents are requested, the NA will return these to the coordinator once the check has been completed. All partners are strongly advised to keep copies of the original documents in such cases.

Documents should be kept in a format and language which will 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 that key information is translated into English.

It is recommended that suitable templates for the supporting documents outlined in Annex III of the grant agreement are developed and agreed by the partnership at the start of the project to ensure consistent and compliant document management. Please refer to the example templates in [Annex I](#) of this document for reference. It remains the responsibility of project beneficiaries to ensure that their supporting documents comply with the requirements.

It is also important for clear and compliant accounting records to be kept, as outlined in Annex I, General Conditions of the Grant Agreement. It must be possible to reconcile costs against accounting records, invoices and contracts in the case of checks or audits.

7.2 On the Spot Checks during the Action

Some projects will also be selected to receive an On the spot Check during the Action. These checks take place during the life of the Project (Action). During these checks the UK NA will check that project activities have actually taken place and that 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 check supporting documents for each applicable budget heading, as outlined in Annex III of the grant agreement, along with evidence of project documentation and results. In some cases, the NA may wish to observe a project activity as part of the check. If you are selected for an On the spot Check during the Action, the UK NA will inform you in advance and outline the documents and information required.

An on the spot check during the project lifetime may, in some cases, 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.

7.3 On the Spot Checks after the Action

Some projects will be selected at random to receive an On the spot Check after the Action. This type of check will take place after the project (Action) has ended and the final report has been submitted to the UK NA. During this type of check the UK NA will check supporting documents for the budget headings where costs were claimed in your final report, along with evidence of project documentation and results. In addition, the NA will complete cross-checks with staffing and accounting records, and other elements which can only be checked on site at your premises.

7.4 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 supporting documents, as outlined in Annex III of the grant agreement, 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 the NA premises and any original documents submitted to the NA will be returned to you once the Desk Check is complete.

As outlined in article II.27 of Annex I, General Conditions of the Grant Agreement, you may also be audited after the end of your project by The European Anti-Fraud Office (OLAF) or The European Court of Auditors.

8. Financial Management

Your Erasmus+ grant is a **contribution** to the cost of running your project and is not intended to cover all costs. The KA2 budget is made up of a number of different budget headings, some of which are calculated on the basis of unit costs and some on the basis of a percentage of actual eligible costs. Not all projects will have budget approved for every budget heading.

The total maximum grant amount awarded to your project is shown in the Special Conditions, Article I.3 of your Grant Agreement. A full breakdown of the approved budget is outlined in Annex II of your Grant Agreement. It is very important that all partners are clear about the budget approved for each budget heading. It will not be possible for the NA to pay more than the maximum total grant awarded.

8.1 Unit Costs

The following budget headings are calculated on the basis of **unit cost** contributions:

- Project Management and Implementation;
- Transnational Project Meetings;
- Intellectual Outputs (only Strategic Partnerships supporting innovation);
- Multiplier Events (only Strategic Partnerships supporting innovation);
- Travel (including top-ups for expensive domestic travel, where applicable), Individual Support and Linguistic Support for Transnational Training, Teaching and Learning Activities

The applicable rates to be used to calculate unit cost contributions are outlined in Annex IV of the Grant Agreement. It is important to note that in some cases the rates differ depending on the country of the partner. Detailed guidance on the KA2 budget is also included within the 2017 Programme Guide, pgs. 131 -135. Refer to the definition of unit costs in the Glossary of this document.

For unit cost budget headings, the eligible amount payable after approval of the final report will be determined not by the actual costs incurred but based on the realisation of the relevant **triggering events**, as outlined in Annex III of your Grant Agreement. If the triggering events realised are fewer than those foreseen in the Grant Agreement and approved application, the final eligible amount will be less than the amount originally approved, regardless of the actual costs incurred. It is therefore

very important to carefully monitor the realisation of triggering events throughout the life of your project in addition to monitoring your actual project expenditure.

The Coordinator is advised to ask all partners to report regularly on the completion of triggering events and to ensure they keep the required supporting documents mentioned in Annex III for all budget headings. These requirements should be reflected in the project monitoring processes, partner agreements and can also be linked to the release of payments to partners. Completing the Mobility Tool+ on a regular basis will also help the Coordinator to keep track of eligible unit costs throughout the life of the project.

Unit Cost budget calculation

The Intellectual Outputs budget heading is used in this example. Unit costs for Intellectual Outputs are based on the rates provided in Annex IV of your Grant Agreement. This outlines the unit cost in Euro per day for each staff category (as defined and depending on the country where the staff member is based).

In this example, the beneficiary wants to calculate the total budget for Intellectual Output 1 (IO1), which has been completed in line with the approved application.

The activity completed is:

- **UK partner:** 10 days at Technician, 5 days at Researcher
- **Spanish partner:** 10 days at Technician and 15 days at Researcher
- **Lithuanian partner:** 10 days at Technician, 5 days at Researcher

The budget calculation would be:

- **UK partner:** 10×162 (UK Technician rate) = 1,620 Euro; 5×214 (UK Researcher rate) = 1,070 Euro. Total: 2,690 Euro.
- **Spanish partner:** 10×102 (Spanish Technician rate) = 1,020 Euro; 15×137 (Spanish Researcher rate) = 2,055 Euro. Total: 3,075 Euro.
- **Lithuanian partner:** 10×55 (Lithuanian Technician rate) = 550 Euro; 5×74 (Lithuanian Researcher rate) = 370 Euro. Total: 920 Euro.

Total budget for IO1: 6,685 Euro.

As mentioned in Annex III, in order to demonstrate the 'triggering event' the beneficiary would need to show that the Intellectual Output had been produced and was of acceptable quality. Supporting documents would also need to be kept, as outlined in Annex III.

8.2 Actual Costs

The following budget headings are calculated on the basis of a percentage of eligible **actual (real) costs**:

- Special Needs Support (if applicable);
- Exceptional Costs for subcontracting or goods/services (if applicable);
- Exceptional Costs for expensive travel from OCTs/ORs (TTLs only, if applicable).

For real cost budget headings the final eligible amount is calculated based on a percentage of the actual eligible costs incurred. The percentage applicable will depend on the budget heading concerned and these are outlined in the Programme Guide, pgs. 131-135.

Actual Cost budget calculation

This worked example relates to the Exceptional Costs budget heading. In the case of Exceptional Costs, 75% of eligible actual costs will be payable.

In this example, up to 1,000 Euro of Exceptional Costs for external translation costs were approved at application stage. If the actual eligible costs incurred were 1,000 Euro, 75% of these costs would be payable, i.e. 750 Euro.

In the case where the actual costs incurred were less than the estimated costs approved at application stage, for example where the actual eligible costs incurred were only 100 Euro, still only 75% of these costs would be payable, i.e. 75 Euro.

In the case of an overspend where the actual costs incurred were 2,000 Euro, the costs payable would be limited to 75% of the awarded amount, i.e. 75% of 1,000 Euro, 750 Euro.

The rules around triggering events and supporting documents for each budget heading are outlined in Annex III. Other important information on eligible cost and the rules around budget transfers are outlined in the Annex I, General Conditions, in Part B – Financial Provisions.

The sections below are intended to provide a summary of key requirements for each budget heading applicable to KA2 Strategic Partnership projects. This guidance must be read alongside the relevant provisions of the Grant Agreement and Annexes, which always take precedence.

8.3 Project Management and Implementation

The Project Management and Implementation budget is calculated based on a unit cost contribution depending on the number of partners involved in the project and the duration. The budget is awarded to the project as a whole. It is up to the partners to decide how the total Project Management and Implementation budget should be allocated between them in order to support the effective delivery of the project and when the payments to partners should be made.

Costs eligible under this budget category can 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, in-house printing (e.g. brochures, leaflets) and information, promotion and dissemination (i.e. website). Costs associated with Managers and Administrative staff time is normally expected to be covered under Project Management and Implementation rather than in the Intellectual Outputs budget category (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, as well as keep evidence (stored on any appropriate medium) of activities and outputs at your premises.

Organisations can use part of their Project Management and Implementation grant 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 1.2 of Special Conditions of the Grant Agreement.

8.4 Transnational Project Meetings

The budget awarded under this heading is a contribution towards the travel and subsistence costs associated with project management meetings held between you and your partners and hosted by one of the approved project partners in the location where they are based. It is also possible for meetings to take place in the location of a seat of an Institution of the European Union, i.e. in Brussels, Frankfurt, Luxembourg, Strasbourg or The Hague, if this was justified in the application for project implementation and coordination purposes.

For example, if you indicated in your application that your French partner, who is officially registered in Paris at the office O, will host a meeting, then this meeting is expected to take place in Paris at the office O. This is to maximise the impact of the project on the participating organisations.

Unless already foreseen in Annex II as approved by the UK NA, exceptions to this rule have to be justified. It is advisable to discuss such changes with your Project Officer in the first instance. In the event of a change to a meeting location i.e. another country or area/ city within the receiving partner country, you would also need to justify the change within the Mobility Tool+. If the change is not sufficiently justified, it may not be approved by the NA. If a change results in a change to the travel distance band, you would also need to retain additional supporting evidence as outlined in Annex III.

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 distance band 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 travel and subsistence costs for participants attending Transnational Project Meetings. For further details please see Annex IV of your 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, based on 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 project's Transnational Project Meetings budget. In these instances travel may be co-financed using 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 Transnational Partner Meetings, whether as staff on a professional or a voluntary basis, or as learners from the organisation.

The supporting documents you need to keep are outlined in Annex III of your Grant Agreement. For travel you need to keep a declaration signed by the receiving organisation specifying the name of

the participant, the purpose of the activity, and its start and end date. Proof of attendance at the meeting must also be kept in the form of a participants list signed by the participants and the receiving organisation, specifying the name, date and place of the transnational project meeting, and for each participant the name and signature of the person, name and address of the sending organisation of the person. You must also keep a detailed agenda and any documents used or distributed during the meeting. Please refer to Annex III for full details of the requirements.

By default, the place of origin for travel to Transnational Project Meetings is expected to be the place where the sending organisation is located and the place of venue the place where the receiving organisation is located. If the place of origin and/or venue reported is different, you will need to explain the reason for this difference in Mobility Tool+. In cases where this leads to a change in the travel distance band you will also need to retain your travel itinerary, along with travel tickets and invoices, specifying the place of departure and arrival.

Please note it is important to consult the [Foreign and Commonwealth Office \(FCO\) website](#) for foreign travel advice when travelling outside the UK. You should also have travel insurance in place, as labour disputes, strikes and financial difficulties cannot be invoked as force majeure.

8.5 Intellectual Outputs

Your project may have been awarded a budget to produce Intellectual Outputs if your project is a Strategic Partnerships Supporting Innovation. Any approved Intellectual Outputs will be listed in Annex II of your Grant Agreement and the associated rates outlined in Annex IV. Costs associated with Manager and Administrative staff costs are normally expected to be co-financed using the Project Management and Implementation grant unless the time was justified in your application and approved by the UK NA.

Intellectual Outputs are based on unit costs therefore beneficiaries should not claim actual salary costs. Annex IV of the Grant Agreement provides details of the unit cost rates per country and per staff category to be used to calculate the budget for Intellectual Outputs.

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 individuals for whom staff costs are being claimed. To demonstrate this formal link, you need to keep proof of the nature of the relationship as registered in the **official records** of the beneficiary organisation. For example, this could be in the form of employment contracts or volunteer agreements. Individuals working on the basis of service contracts are not eligible as staff and time cannot be claimed for these individuals for working on developing Intellectual Outputs.

Timesheets must be kept for each person working on developing each Intellectual Output, as per Article I.2 of Annex III. A separate timesheet should be kept for each person working on each Intellectual Output, at each staff category. Staff time should be recorded on Intellectual Output timesheets in **days**. Totals of hours worked should be rounded up or down to the nearest whole working day. Staff timesheets for Intellectual Outputs should only include time spent working on developing the Intellectual Outputs. Timesheets for Intellectual Outputs should be kept entirely separate from any other timesheets used by the beneficiary organisations. Keeping clear and accurate timesheets is essential in order to ensure that time is recorded accurately on Mobility Tool+.

The coordinator should keep the Mobility Tool + up to date on an ongoing basis. You will need to upload finalised Intellectual Outputs onto the Erasmus+ Project Results Platform before you submit your final report.

8.6 Multiplier Events

Multiplier Events funding is a contribution to the costs incurred for organising events aimed specifically at disseminating Intellectual Outputs produced by the project. They are only applicable for Strategic Partnerships Supporting Innovation which include Intellectual Outputs. The budget is calculated on the basis of unit costs based on the number of local and/or international participants taking part in each event. Any approved Multiplier Events will be listed in Annex II of your agreement and the associated unit cost rates can be found in Annex IV of your Grant Agreement.

Each Multiplier Event should be delivered in line with the approved application and Grant Agreement. Multiplier Events can take place in the countries of the funded partners in the project. Additionally, they can take place in the seat of an institution of the European Union (Brussels, Frankfurt, Luxembourg, Strasbourg or The Hague) even when no partner is based there, if this was justified in the application and approved by the NA. Multiplier Events can also be held in the country of an associated partner if this was justified in the application and approved by the NA. In such cases, for the purposes of reporting in the Mobility Tool+ and allocating budget, one of the funded partners would need to be designated to 'host' the event. This is because associated partners do not receive funding under the programme rules. Please refer to the 2017 Programme Guide, pg. 124.

It is important to note that staff from the organisations participating in the project cannot be included as either local or international participants for the purposes of calculating the eligible budget.

Participants in Multiplier Events (external to the partnership) can be of two types - local or international:

- Local participants are from the country in which the event is taking place
- International participants are from other countries

If fewer eligible participants attend a Multiplier Event than those foreseen in the application, this may result in a budget reduction at final report stage. It is therefore important to take steps to promote Multiplier Events to relevant target groups and stakeholders and to ensure good attendance and to maximise the potential for impact.

Multiplier Events funding does not cover general project-related events such as press conferences, however these may be co-financed using the Project Management and Implementation budget. To support any Multiplier Event costs claimed you will need to describe each Multiplier Event in your Final Report and keep copies of the agenda and other documents distributed at the event including, where applicable, any evaluation documents. Proof of attendance at the Multiplier Event must be kept in the form of a participants list signed by the participants, specifying the name, date and place of the Multiplier Event, and for each participant, the name and signature of the person and name and address of the sending organisation of the person. Article I.2 of Annex III of your Grant Agreement outlines the supporting document requirements in full.

If you do not produce a planned Intellectual Output, any related Multiplier Events costs which were originally approved will not be considered eligible. If the UK NA awarded funding for the development of several Intellectual Outputs, but only some of them are ultimately delivered (fully completed), the UK NA will determine the extent to which each of the related Multiplier Events are eligible for funding.

8.7 Special Needs Support

Special Needs Support funding is calculated on the basis actual costs. Any funding awarded under this heading will be outlined within Annex II of your Grant Agreement. 100% of the actual eligible costs will be payable. The funding is a contribution towards costs which are essential to allow those with physical, mental or health related needs to take part in the approved project activities. Please note that this kind of support can only be claimed if costs are additional to those already covered by unit contributions.

For Special Needs Support, you must report in the Mobility Tool+ on the type of additional costs and the actual amount incurred to support participants with special needs. To support the claimed costs

you will need to keep invoices specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice as outlined in Article II.2 of Annex III.

8.8 Exceptional Costs

Exceptional Costs can only be claimed where they have been requested in the application and approved by the NA in Annex II of the Grant Agreement. For all Exceptional Costs, you need to report the actual costs incurred in the Mobility Tool+.

Subcontracting, Goods or Services

This type of Exceptional Costs funding is a contribution to the actual costs of subcontracting or the purchase of goods or services which cannot be provided by the participating organisations themselves for duly justified reasons. If approved by the NA, this budget heading can also cover the costs of obtaining a financial guarantee, where this is required by the NA. Where Exceptional Costs have been approved in Annex II of the Grant Agreement, the UK NA will reimburse 75% of the eligible costs actually incurred, up to a maximum per project of €50.000, excluding any costs for a financial guarantee.

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. Refer to II.2 of Annex III of the Grant Agreement for full details of the requirements.

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.

Subcontracting

As per Annex I, General Conditions, Articles II.11 and II.12 of your Grant Agreement, where applicable, all projects must 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.

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 in

the application and approved in the Grant Agreement. In the event of an underspend on Exceptional Costs, a project is still not able to add additional subcontracting costs which were not originally approved.

Expensive Travel Costs for OCTs/ORs (Training, Teaching and Learning Activities only)

The second type of Exceptional Costs funding relates to a contribution to expensive travel costs of participants from/to Outermost Regions and [Overseas Countries and Territories](#) (OCTs) participating in Training, Teaching and Learning activities. Where these costs have been requested and approved in Annex II, the UK NA will reimburse 80% of eligible actual costs, where the standard funding rules do not cover at least 70% of the costs. In terms of supporting documents you will need to keep invoices specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice.

8.9 Transnational Training, Teaching and Learning Activities

Any approved Training, Teaching or Learning Activities will be listed in Annex II of your Grant Agreement and the unit cost rates are outlined in Annex IV.

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 costs.

Transnational Training, Teaching and Learning Activities must take place in line with the approved application. Activities associated with learners as well as long-term activities of staff from or to Partner Countries are not eligible. Participants can take part in an activity held in their own country, and receive funding providing that the distance between the place of departure and place of arrival is at least 10 km as per the online distance calculator **and** the activity involves participants from at least two different Programme Countries.

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 in Blended Mobility; and
- Professors, Teachers, Trainers, educational and administrative staff employed at a participating organisation.

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

Travel

Travel costs are a unit cost 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 distance band 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 eligible grant amount automatically on the basis of the information input.

In terms of supporting documents, you need to keep a declaration signed the receiving organisation specifying the name of the participant, the purpose of the activity, as well as its starting and end date.

If the place of departure and/or arrival are different from the place where the sending organisation (for departure) or the receiving organisation (for arrival) are located and this leads to a change in the distance band, 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. Please refer to Article I.2 of Annex III of your Grant Agreement for full details of the requirements.

Top-ups for Expensive Domestic Travel

If approved in Annex II of your Grant Agreement, top-ups for expensive domestic travel costs are a unit cost contribution to expensive domestic travel costs to or from a remote location, where costs exceed 225 Euro. Remote areas are understood as places that are difficult to reach; for example, mountain areas, islands or isolated towns where there is a significantly limited access to motorways, railways, or bus routes.

Where top ups for expensive domestic travel costs have been approved in Annex II, you will need to provide detailed information in your final report to justify the need for the top ups. This will need to include a description of the full travel itinerary and costs to demonstrate that costs did in fact exceed 225 Euro for duly justified reasons. This explanation should also outline why it was not possible to take a more economical route. If the justification provided at final report stage is not considered sufficient, the funding may not be approved **even if** a request was approved in Annex II. It is

therefore very important to keep details of the itinerary and cost and to include sufficient justification within your final report.

In terms of supporting documents, you must keep proof of attendance at the activity in the form of a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the activity, as well as its start and end date. Refer to 1.2 of Annex III of the Grant Agreement for full details of the requirements.

Individual Support

Individual Support is intended to cover subsistence costs incurred by participants, including accompanying persons, taking part in transnational Training, Teaching and Learning 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 IV of your Grant Agreement.

If requested and approved, 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 can be recorded on the Mobility Tool+ as travel days. These days will be considered for the calculation of Individual Support; however, travel days must not be included for the purposes of meeting the minimum eligible duration of the activity.

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 start and end dates.

Linguistic Support

Where approved in Annex II, Linguistic Support is a contribution to the costs of supporting participants to improve their knowledge of the language of instruction or work to be used during long-term transnational activities abroad lasting **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 Annex III Article 1.2. of your Grant Agreement for full details of the requirements.

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 II, General Conditions, of the Grant Agreement. Please note that any budget transfers must be made in line with the requirements set out in Special Conditions in Article II.22 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: 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.

8.10 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 and that the Mobility Tool+ is kept up to date with accurate information.

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 I.2 (calculation of unit contributions) and II.2 (calculation of actual costs) in Annex III of the agreement, according to each individual budget heading, as these 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.2.3 in Annex I (General Conditions), 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.27 of Annex I, General Conditions, all partners need to keep their original documents stored on any appropriate medium. This includes digitalised originals if they are authorised by the relevant national law.

8.11 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.

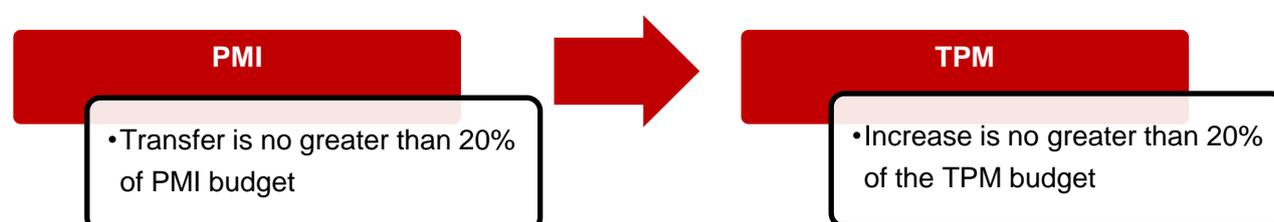
8.12 Budget Transfers

Beneficiaries are permitted to adjust the estimated budget set out in Annex II by transfers between the different budget categories, as long as the project is implemented as described in Annex I. Article I.3.3 in Special Conditions of your Grant Agreement outlines strict conditions which projects must adhere to when making transfers between budgets. Any changes which do not comply with these conditions will constitute a significant change to the project which must be approved in advance by the UK NA, in line with the contract amendment procedure. Significant changes to projects' budgets will only be approved in **exceptional circumstances**. For more information, please see section 3.2 of this document.

As per Article I.3.3, up to 20% of the budget awarded for any budget heading except Special Needs Support can be transferred out. The budget headings Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities can be

increased by up to a maximum of 20% of the amounts awarded to each. However, Project Management and Implementation and Exceptional Costs cannot be increased.

The flowchart below is an example of an acceptable transfer from the PMI to TPM budget heading:



Projects can also transfer funds from any budget category to Special Needs Support, even if no funds have previously been allocated to this budget heading. Please refer to Annex II of your Grant Agreement for the approved amounts for each budget heading.

Table 3 below outlines the budget amendments which can be made in accordance to Article I.3.3.

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%

Table 3 – Budget Transfers

Please be aware that 20% of the budget you are transferring from may not equate to 20% of the budget you are transferring into. Therefore you may need to adjust the amounts.

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. Under no other heading may transfers occur to a budget heading of zero.

8.13 Ineligible Expenditure

As per Article II.19.4 in Special Conditions of your 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.

8.14 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.

Any conversion into euro of costs incurred in other currencies must be made by the beneficiaries at the monthly exchange rate established by the Commission and published on its website² applicable on the day when the bank account of the coordinator is credited.

If Article I.4.3 provides for a second or more pre-financing payments, the conversion rate must apply for all costs incurred in the period from the date of transfer of the related pre-financing payment until the date of transfer of the next pre-financing payment. For projects without pre-financing, you should use the exchange rates applicable on the day when the agreement was signed by the last of the two parties. You should use these rates until the end of your project.

9. Reporting to the National Agency

Reports to the National Agency will need to be completed and submitted via Mobility Tool+. The financial information will be pulled into the reports based on the information input into Mobility Tool+ at the point of submission. It is therefore very important to ensure that Mobility Tool+ is updated with accurate information on a regular basis throughout the life of the project. It should be fully up to date and correct, with information covering the full reporting period, before you submit a report to the UK NA.

9.1 Progress Report

Some KA2 projects will be required to submit a Progress Report to the UK NA via Mobility Tool+. Article I.4.3, Special Conditions of your Grant Agreement outlines the reporting requirements and key dates for your project. You must submit your report by the deadline specified in your Grant Agreement.

The Progress Report will need to be completed and submitted by the Coordinator on behalf of the partnership. The 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. You should include enough relevant information to allow the UK NA to make a meaningful assessment of the progress of your project. Further guidance on how to complete and submit your report will be provided by the NA closer to the end of the reporting period.

² http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/index_en.cfm

Once the UK NA has assessed your Progress Report, you will receive feedback along with confirmation regarding the release of any further pre-financing payment. There may also be recommendations or action points for you to address within set timescales.

9.2 Interim Report

All KA2 projects with a project duration of two years or longer are required to submit an Interim Report. Article I.4.3 of your Grant Agreement, Special Conditions outlines the reporting requirements and key dates for your project. You must submit your report by the deadline specified in your Grant Agreement.

Interim Reports will need to be completed and submitted by the Coordinator on behalf of the partnership, via Mobility Tool+. Further guidance on how to complete and submit your Interim Report will be provided closer to the end of the reporting period. The report form will be made up of a qualitative and a financial section, which will be used to assess the extent to which your project is being delivered in line with your original application. You should include enough relevant information to allow the UK NA to make a meaningful assessment of the progress of your project. Further guidance on how to complete and submit your report will be provided by the NA closer to the end of the reporting period.

Once the UK NA has assessed your Interim Report, you will receive feedback along with confirmation regarding the release of any further pre-financing payment. There may also be recommendations or action points for you to address within set timescales.

9.3 Final Report

All KA2 projects will be required to submit a Final Report **within 60 days** of their project end date, as specified in the Grant Agreement. Failure to meet the submission deadline may result in the UK NA requesting a full refund of any pre-financing payments already made.

Coordinators will need to submit the Final Report via Mobility Tool+. Further guidance on how to download, complete and submit your Final Report via the Mobility Tool+ will be provided closer to the end date of your project.

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 total maximum of 100 points. If the Final Report scores less than 50 points in total, the UK NA may 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 proved to add value at EU level;
- 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 may be reduced for poor, partial or late implementation of the project. Reductions may be applied to the final total of eligible costs on the following basis:

- 25% if the final report scores at least 40 points and below 50 points;
- 50% if the final report scores at least 25 points and below 40 points;
- 75% if the final report scores below 25 points.

10. 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 provided with your Grant Agreement.

If you have an urgent query and 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.

Key Webpages

To help assist you with the implementation of your project, below are links to some useful resources on the Erasmus+ website:

- Manage your grant: <https://www.erasmusplus.org.uk/manage-your-grant-2>
- Results and statistics: <https://www.erasmusplus.org.uk/results-and-statistics>
- Promotion and dissemination: <https://www.erasmusplus.org.uk/promotion-and-dissemination>
- Erasmus+ stories and case studies: <https://www.erasmusplus.org.uk/stories/sector>
- EC Distance calculator: http://ec.europa.eu/dgs/education_culture/tools/distance_en.htm

11. Glossary

<p>Accompanying Person</p>	<p>An accompanying person is someone who accompanies participants (learners or staff) with special needs (i.e. disabilities) on a mobility activity in order to ensure protection, provide support and extra assistance.</p>
<p>Activity</p>	<p>A set of tasks carried out as part of a project.</p> <p>Under KA2 Strategic Partnerships types of activity could include:</p> <ul style="list-style-type: none"> - Cooperation activities around the exchange of ideas, practices and methods; - Development and/or dissemination of innovative outputs or practices; - Transnational teaching, training or learning activities which support the overall project implementation. <p>Activities will vary according to the type of Strategic Partnership and the specific project objectives. All approved activities will be outlined in the approved application form and your Grant Agreement.</p>
<p>Adult Education</p>	<p>All forms of non-vocational adult education, whether of a formal, non-formal or informal nature.</p>
<p>Adult learner</p>	<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) with the exception of VET teachers/trainers.</p>
<p>Associated Partner</p>	<p>Strategic Partnerships may involve associated partners from the public or private sector who contribute to the implementation of specific project tasks/activities or support the dissemination and sustainability of the project. For contractual management issues, associated partners are not considered as part of the project partners, and they do not receive funding. However, their involvement and role in the project and different activities have to be clearly described.</p>
<p>Beneficiary</p>	<p>The applicant organisation becomes the grant beneficiary (the Coordinator) 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</p>

	selected the project. If the application was made on behalf of other participating organisations, the partners may become co-beneficiaries of the grant.
Co-financing	Co-financing refers to the fact that the EU grant may not cover all the cost of running a project. The remaining costs must be borne by the beneficiary, or covered by external contributions other than the EU grant.
Consortium	Two or more participating organisations teaming up to prepare, implement and manage a project or an activity within a project. For KA2 projects in the fields of VET and Adult Education, the consortium must be international and include organisations from a minimum of three different programme countries.
Dissemination	Sharing results, lessons learned, outcomes and findings with the wider community (excluding participating organisation of a project) thus enabling others to benefit from work that has received EU funding. Making others aware of the project will impact on other organisations in the future and will contribute to raising the profile of the organisation carrying out the project.
ECVET	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/
EQAVET	European Quality Assurance Reference Framework for Vocational Education and Training is a tool for policy-makers based on a four stage quality cycle that includes goal setting and planning, implementation, evaluation and review. It respects the autonomy of national governments and is voluntary system to be used by public authorities and other bodies involved in quality assurance.
Erasmus+ Programme	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.
Erasmus+ Project Results Platform	The European Commission's dissemination platform for Erasmus+ projects results. Final KA2 project outputs must be uploaded onto the

(E+PRP)	E+PRP by final report stage.
Europass	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
Exceptional Costs	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.
Exploitation	Exploitation is a planned process of transferring the successful results of the project to appropriate decision-makers in regulated local, regional, national or European systems and also involves convincing individual end users to adopt and / apply these initiatives.
Force Majeure	An unforeseeable exceptional situation or event beyond the participants control and not attributable to error or negligence of their part. The following cannot be invoked as force majeure: labour disputes, strikes, financial difficulties or any default of a service, defect in equipment or materials or delays in making them available.
Grant Agreement	A legally binding document (contract) 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) as well as outlines grant payment and reporting structure.
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. Intellectual Outputs are only applicable for projects supporting Innovation. More information on Intellectual Outputs can be

	found in section 2.3.3 of this document.
Key Action 2 (KA2)	<p>A strand of the Erasmus+ Programme which supports Strategic Partnership projects. KA2 Strategic Partnerships can address one or more fields of education, training and youth, and aim to develop, transfer and/or implement innovative practices and/or promote the exchange of ideas and 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.</p> <p>In 2017 there are two types of KA2 Strategic Partnership: Exchange of Practices and Supporting Innovation.</p>
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.
Open Licence	An open licence is a way by which the owner of a work grants permission to enable the general public to view and utilise the resource. There are different open licences according to the extent of the permissions granted or the limitations imposed and the beneficiaries are free to choose the specific license to apply to their work. An open licence must be associated to each resource produced.
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 or, if duly justified and approved, taking place in the location of a seat of an Institution of the European Union. The activities must add value to the project and contribute to achieving the overall project objectives. More information on Training, Teaching and Learning Activities can be found in section 2.3.5 of this document.
Transnational Project Meeting	A meeting between project partners hosted by one of the participating organisations or, if duly justified and approved, in the location of a seat of an Institution of the European Union, with a purpose to discuss project implementation and coordination activities (cannot be used and/or claimed for Intellectual Outputs development). More information on Transnational Project Meetings can be found in section 2.3.2 of this document.

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. Multiplier Events can take place in the country of one of the organisations participating in the KA2 project, country of any of the approved associated partners involved in the Strategic Partnership or, if duly justified and approved, can also take place in the location of a seat of an Institution of the European Union. More information on Multiplier Events can be found in section 2.3.4 of this document.
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 a 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, train 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 (Coordinator).
People with fewer opportunities	Persons facing 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 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.

Transnational	This relates (unless otherwise indicated) to any action involving at least two Programme Countries.
UK NA	The Erasmus+ UK National Agency (The British Council in partnership with Ecorys UK)
Unit Costs	A funding mechanism where the grant is calculated based on a scale of unit costs established in advance, which vary according to factors such as the number of participants, distance travelled or the duration of the activity. For KA2 projects the following budget headings are funded on a unit cost basis: Project Management and Implementation, Transnational Project Meetings, Intellectual Outputs, Multiplier Events, and Travel, Individual Support and Linguistic Support for Transnational Training, Teaching and Learning Activities. Please refer to the unit cost rates outlined in Annex IV of your Grant Agreement for each budget heading and note that Mobility Tool+ will calculate the relevant unit cost automatically based on the activity details input.
VET (Vocational Education and Training)	Education and training which aims to equip people with knowledge, know-how, skills and/or competences required in particular occupations or more broadly on the labour market. For the purpose of Erasmus+ projects focusing on initial or continuing vocational education and training are eligible under VET actions.

Annex I: Example Supporting Document Templates

The example templates on the following pages are intended to give you an idea of how you can develop the required supporting documents for each of the budget headings, as outlined in Annex III of your Grant Agreement.

These templates are just examples. It is not a requirement for you to use these specific templates for your project, although you may find them useful as a starting point. You must, however, ensure that your supporting documents contain all the required information outlined in Annex III. For the purposes of this document, the examples have been produced in Word; however, you may find it useful to develop some documents (e.g. Intellectual Outputs timesheets) using Excel. It is recommended that you develop standard templates for supporting documents, to be used consistently by all members of the partnership. These should be checked for compliance against Annex III and agreed at the start of the project.

The following **example** templates are available:

[A: Transnational Project Meetings – Declaration of Attendance](#)

[B: Transnational Project Meetings – Participant List](#)

[C: Multiplier Event – Participant List](#)

[D: Intellectual Output – Timesheet](#)

[E: Teaching, Training and Learning Activities – Declaration of Attendance](#)

A: Transnational Project Meetings - Declaration of Attendance

Insert your
project logo
(if applicable)

DECLARATION OF ATTENDANCE

Participant Name

.....

from

Organisation Name

.....

attended a

Transnational Project Meeting

for the Erasmus+ Key Action 2 project

Project name

at

Host organisation name, Town, Country

between

Start date – End date

Signed:

Position:

Host Org name, Country

B: Transnational Project Meetings – Participant List

Transnational Project Meeting

Project Name

Start date – End date

Host Partner Name, Location, Country

Insert your project logo (if applicable)

Participant Name	Participant Signature	Name of Sending Organisation	Address of sending organisation

Signed:

Position:
Host Partner Org. name, Country

C: Multiplier Event – Participant List

Multiplier Event: Title

Project Name

Date of Event

Location, Country

Insert your project logo (if applicable)

Participant Full Name*	Participant Signature	Name of Sending Organisation*	Address of sending organisation or person	Email address of participant**

* Participants from the funded partner organisations are not eligible participants for the purposes of calculating the unit cost grant.

** It is not a requirement to include the email address of the participant; however, it is recommended to capture this information where possible.

D: Intellectual Output - Timesheet

Intellectual Outputs Timesheet

Project Name

Project Reference

Insert your project logo (if applicable)



Organisation Name:	<i>Partner Organisation name</i>
Staff Name:	
Intellectual Output number:	<i>E.g. IO1 – use numbering from the application</i>
Staff Category:	<i>As per Annex IV. This is not the job title of the person</i>
Month:	

Date	Brief description of work undertaken on IOs	Total days
<i>DD/MM/YYYY</i>	<i>It should be clear how the work relates to the development of the IO.</i>	
Total		<i>Round up or down to nearest day</i>

Manager signature:	
Position:	
Date:	

Staff signature:	
Date:	

E: Teaching, Training and Learning Activities – Declaration of Attendance

Insert your project logo (if applicable)

DECLARATION OF ATTENDANCE

Participant Name

.....

from

Organisation Name

.....

attended a

Teaching, Training and Learning Activity:

Activity Title

for the Erasmus+ Key Action 2 project

Project name

at

Host organisation name, Town, Country

between

Start date – End date

Signed:

Position:

Host Org name, Country

