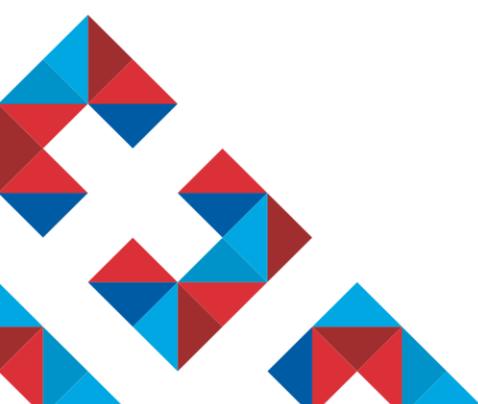


2016 Key Action 2 Handbook

For KA2 Strategic Partnerships in VET, Adult
Education and Youth

Version 0



My reporting dates

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

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

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

Mobility Tool+

Username:.....

Password:.....

Erasmus+ Results Dissemination Platform

Username:.....

Password:.....

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1. General Definitions

Accompanying Person	As a general definition applying to all fields of education, training and youth, an accompanying person is the one who accompanies participants - whether learners or staff/youth workers - with special needs (i.e. with disabilities) in a mobility activity, in order to ensure protection, provide support and extra assistance.
Activity	<p>A set of tasks carried out as part of a project.</p> <p>Under KA2 Strategic Partnerships this would include:</p> <ul style="list-style-type: none"> - Activities around exchanges of practices; innovative practices; recognition and validation of knowledge, skills and competences; cooperation between regional authorities. - Activities supporting learners with disabilities/special needs or combating segregation and discrimination. - Activities aimed at equity, diversity and inclusion. - Transnational initiatives encouraging active citizenship and entrepreneurship (including social entrepreneurship).
Adult education	All forms of non-vocational adult education, whether of a formal, non-formal or informal nature.
Adult learner	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).
Beneficiary	<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 selected the project. If the application was made on behalf of other participating organisations, the partners may become co-beneficiaries of the grant.</p>
Co-financing	Co-financing implies that the EU grant may not finance the entire costs of the project; the project must be funded by sources of co-financing other than the EU grant.

<p>Consortium</p>	<p>Two or more participating organisations teaming up to prepare, implement and manage a project or an activity within a project. A consortium can be national (i.e. involving organisations established in the same country) or international (involving participating organisations from different countries).</p>
<p>ECVET</p>	<p>European Credit System for Vocational Education and Training is a system that aims to facilitate the validation, recognition and accumulation of work-related skills and knowledge acquired during a stay in another country or in different situations. For further information please visit: http://www.ecvet-toolkit.eu/</p>
<p>EQAVET</p>	<p>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.</p>
<p>Erasmus+ Programme</p>	<p>A programme funded by the European Commission from 2014 to 2020, which offers a range of funding opportunities for UK organisations actively involved in delivering education, training, youth and sport activities.</p>
<p>Erasmus+ Project Results Platform (PRP)</p>	<p>The European Commission’s dissemination platform for Erasmus+ projects results.</p>
<p>Europass</p>	<p>Europass is a portfolio of five documents which help to make the holder’s skills and qualifications clearly and easily understood across Europe. The documents are: Europass CV, the Diploma Supplement, the Certificate Supplement, the Europass Mobility and Language Passport. Europass also includes the European Skills Passport, a user-friendly electronic folder that helps the holder to build up a personal, modular inventory of his or her skills and qualifications. The aim of Europass is to facilitate mobility and improve job and lifelong learning prospects in Europe. For further information please visit: https://europass.cedefop.europa.eu/en/about</p>
<p>Exceptional Costs</p>	<p>A contribution to the real costs incurred in relation to the sub-contracting of goods or services that cannot be provided by the beneficiary</p>

	organisations themselves.
Force majeure	It is 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.
Groups of young people active in youth work but not necessarily in the context of a youth organisation (also informal group of young people)	Group of at least four young people which does not have legal personality under the applicable national law, provided that their representatives have the capacity to undertake legal obligations on their behalf. These groups of young people can be applicants and partners in some Actions of Erasmus+. For the purpose of simplification, they are assimilated to legal persons (organisations, institutions, etc.) in this Handbook and fit within the notion of Erasmus+ participating organisations for the Action in which they can take part. The group must be composed of at least four young persons and their age should be according with the overall age of the young people in the programme (13-30).
Informal learning	Learning resulting from daily activities related to work, family or leisure which is not organised or structured in terms of objectives, time or learning support; it may be unintentional from the learner's perspective.
Intellectual Outputs	Substantial, high quality tangible outputs of the project such as open educational resources, curricula, IT tools or other pedagogical materials. More information on Intellectual Outputs can be found in section 3.3.3 of this document.
Key Action 2 (KA2)	A strand of the Erasmus+ Programme which supports Strategic Partnership projects. KA2 projects can address one or more fields of education, training and youth, and aim to develop, transfer and/or implement innovative practices and promote the exchange of practice. KA2 projects can involve a range of different activities, including transnational teaching, training and/or learning activities where these contribute to achieving the objectives of the project.

Learning Outcome	<p>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.</p>
Training, Teaching and Learning Activities	<p>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 3.3.5 of this document.</p>
Transnational Project Meeting	<p>It is 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 3.3.2 of this document.</p>
Legal Representative	<p>An individual authorised to sign legally binding documents on behalf of the beneficiary organisation.</p>
Mobility Tool+	<p>The online management and reporting tool for all Erasmus+ beneficiaries.</p>
Multiplier Events	<p>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. It can take place in the country of one of the organisations participating in the KA2 project 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 3.3.4 of this document.</p>
Non-formal learning	<p>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.</p>
Participant	<p>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</p>

	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 some obstacles (e.g. disability, economical obstacle, educational difficulties, cultural differences, health, social, geographical etc.) that prevent them from having effective access to education, training and youth work opportunities.
People with special needs	A person with special needs is a potential participant whose individual physical, mental or health-related situation is such that his/her participation in the project or mobility activity would not be possible without extra financial support.
UK NA	The Erasmus+ UK National Agency (The British Council in partnership with Ecorys UK)
Young people	In the context of the Erasmus+ Programme, this means individuals aged between 13 and 30.
Youthpass	<p>The European tool to improve the recognition of the learning outcomes of young people and youth workers from their participation in projects supported by the Erasmus+ Programme. Youthpass consists of:</p> <ul style="list-style-type: none"> a) certificates that can be obtained by participants in several Actions of the Programme; and b) a defined process which supports young people, youth workers and youth organisations to reflect about the learning outcomes from an Erasmus+ project in the field of youth and non-formal learning. Youthpass is also part of a broader European Commission strategy which aims to enhance the recognition of non-formal and informal learning and of youth work in Europe and beyond.
Youth worker	A professional or volunteer involved in non-formal learning who supports young people in their personal socio-educational and professional development.

2. Introduction

The 2016 KA2 Handbook for Key Action 2 (KA2) Strategic Partnerships in VET, Adult Education and Youth is designed to help UK beneficiaries with the management of their 2016 KA2 project. The information contained in this document aims to supplement that provided within your grant agreement, any additional annexes and the 2016 Programme Guide as well as acting as a quick reference point for common queries and procedures. Please ensure you refer to these documents regularly throughout the lifetime of your project to ensure you are managing your grant in accordance with programme rules.

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

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

3. Background

3.1. The Erasmus+ Programme

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

3.2. Key Action 2 Strategic Partnerships

KA2 Strategic Partnerships provide an exciting opportunity for organisations to work together in order to develop, implement and/or transfer innovative practices, leading to high quality teaching, training, learning and youth work, institutional modernisation and societal innovation in the fields of Vocational Education and Training (VET), Adult Education (AE) and Youth. KA2 projects are flexible and can involve a range of different activities depending on the 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 answer to the innovation aspect of the project.

KA2 Strategic Partnerships are open to organisations from both Programme and Partner Countries ([Programme Guide, p. 21-24](#)). However, when involving organisations from Partner Countries their essential added value to the project must be clearly demonstrated. There are also some restrictions on activities that can take place in Partner Countries. Please refer to Annex III of your grant agreement for further details.

3.3. Activities

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

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

3.3.1 Project Management and implementation

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

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

3.3.2. Transnational Project Meetings

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

3.3.3. Intellectual Outputs (applicable only for Strategic Partnerships supporting innovation)

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 include Intellectual Outputs.

3.3.4. Multiplier Events (applicable only for Strategic Partnerships supporting innovation)

Multiplier Events are national or transnational conferences, seminars or events aimed at sharing and disseminating Intellectual Outputs produced (completed or at the advanced stage) by the project. Only projects supporting innovation and delivering Intellectual Outputs can include Multiplier

Events. It can take place in the country of one of the organisations participating in the project or, if duly justified and approved, 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. 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.

3.3.5. Training, Teaching and Learning Activities

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

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

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

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

You will be expected to deliver the project activities and outputs outlined in your application form and approved in your Grant Agreement and Annexes I - IV. You should therefore refer back to these documents regularly and review progress with your partners to ensure your project is on track. If any project activities are not delivered as outlined in the original application or as per 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.

3.4. Transnational Youth Initiatives

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

4. Contracting Process

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

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

4.1. Grant Agreement and Annexes

The KA2 grant agreement is a multi-beneficiary 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. All successful beneficiary organisations (the coordinators) must enter into contract with the UK NA by signing a grant agreement, which includes a number of annexes. It is important to familiarise yourself with the terms of your grant agreement and annexes and to ensure that your project partners are also aware of these.

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.

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

Special Conditions of the Grant Agreement

Your Grant Agreement consists of Special Conditions which includes some important information that is specific to your project, including the start and end dates, project name, grant awarded, reporting deadlines, bank account details and grant payment structure.

Annex I: General Conditions of the Grant Agreement

General Conditions is Annex I and it should be read in conjunction with Special Conditions of the 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 by sector and Key Action, checks and audits as well as monitoring and evaluation.

Annex II: Description of the Project and Estimated Budget

Annex II of the grant agreement consists of project details, budget summary and a breakdown, and a list of participating organisations. The maximum total grant awarded for the project is shown under Budget Summary 'Total Calculated'. Annex II details the Training, Teaching and Learning activities, Intellectual Outputs and Multiplier Events, if applicable, approved for your project. Information in this annex is based on your application, taking into account any changes made by the UK NA prior to the approval of your project. Any Training, Teaching and Learning activities, Intellectual Outputs or Multiplier Events that are not listed in Annex II, have not been approved and cannot be funded.

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 Condition of the Grant Agreement. Any changes falling outside of these rules will require formal approval by the UK NA. More information on budget transfers can be found in section 7.10 of this document.

This annex also lists all the approved partners involved in the project. Each partner organisation's legal form, address and PIC number feature in this annex and you should communicate any changes to these details to the UK NA who will be able to offer further guidance.

Annex III: Financial and Contractual rules

This annex provides important information on the financial and contractual rules that apply to your project. Please ensure you read this annex thoroughly. The UK NA has highlighted important sections of this annex where possible within the 2016 KA2 Handbook; however it is your

responsibility to ensure you understand and comply with the requirements. Failure to do so may result in you having to repay all or part of your grant to the UK NA. You should also ensure that your partners are aware of these requirements.

Annex IV: 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

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

In order to be eligible, a KA2 Vocational Education and Training or Adult Education Strategic Partnership must always have a minimum of three organisations from three different Programme Countries. KA2 Youth Strategic Partnerships may have a minimum of two organisations from two different Programme Countries in so as long as all organisations are youth organisations or groups of young people active in youth work but not necessarily in the context of a youth organisation. If this is not the case KA2 Youth Strategic Partnerships will also require a minimum of three organisations from three different Programme Countries. If projects lose partners and fall below the minimum required number, unfortunately the project will not be able to continue and the agreement will be terminated by the UK NA. More information on agreements termination can be found in Annex I, General Conditions, Article II.17.

4.2. Changes to Grant Agreements

Your 2016 KA2 project has been approved by the UK NA based on the information you provided in your original grant application, which now forms part of your grant agreement. You are therefore expected to deliver your project on this basis.

You should note that the UK NA is not obliged to approve changes to your project and will only do so in exceptional circumstances. As such, you should not action any changes until you have received written confirmation from the UK NA (verbal agreements are not binding on either party). Should you proceed with these changes before receiving authorisation to do so, the UK NA has the right to request repayment of the corresponding part of your grant.

Any request for a contract amendment must be received by the UK NA in good time before the intended implementation of the changes in order to allow sufficient time for approval. The UK NA will respond to your request within 45 days of receiving all correct documentation. The UK NA may

request additional documents or clarifications in order to support your request. In this case 45 days deadline would be postponed and would start from the day on which all correct and additional documentation is received. The UK NA is unable to process any amendment requests less than one month before the end of project activity, in accordance with European Commission guidance. You should therefore ensure that your project is on track and no changes need to be made at this late stage. Please refer to Annex I, General Conditions, Article II.13.1 – II.13.5 of your grant agreement for further information.

Table 1 below provides details of some of the most common changes which you may wish to request.

Change Requested
Contact person
Legal signatory
Beneficiary address (Coordinator & partners)
Bank details
Project activities
Beneficiary organisation
Beneficiary Organisation name (Coordinator)
Partner withdrawal
New/Replacement partners
Project duration
Reporting schedule
Project budget

Table 1 – KA2 contract amendments

In all cases please notify the UK NA before making the change via email and they will provide you with further guidance.

5. Management of your Project

5.1. Quality Assurance

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

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

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

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

- Crosschecking activities compliance with application form and, if applicable, approved contract amendments.

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

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

Where possible, training content should be validated using, for example, Europass or ECVET, but other less formal methods are acceptable, if they are in line with original application form. More information on recognition and validation of learning can be found in section 5.4 of this document.

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 incorporate them in your partnership agreement, where appropriate.

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

- carry out the project in accordance with the terms and conditions of the Grant Agreement and Annexes I-IV;
- comply with any legal obligations outlined in the agreement; and
- agree appropriate internal arrangements to ensure the proper implementation of the project;
- keep all original documents, especially accounting and tax records, stored on any appropriate medium, including digitalised originals, during a period of five years starting from the date of payment of the balance.

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;

- 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;
- establish the requests for payment in accordance with the Agreement;
- ensure that appropriate payments are made to the other beneficiaries without unjustified delay. All payments should be made to the other beneficiaries by bank transfer and appropriate evidence of the amounts transferred to each beneficiary for any checks should be kept;
- provide all the necessary documents in the event of checks and audits initiated before the payment of the balance;
- update the online reporting system 'Mobility Tool+'; please see the Mobility Tool+ User Guide for further guidance, which could be found on <https://www.erasmusplus.org.uk/youth-projects> under Key Documents section. Further guidance can be found in the webinar on using Mobility Tool+ (<https://www.youtube.com/watch?v=vD5Uh1RCaMM>);
- update the online Erasmus+ Project Results Platform; and
- comply with monitoring procedures upon the UK NA request, i.e. a call, progress update e-mail, 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 amounts of pre-financing and linking payments to results and outcomes. It is recommended that Coordinators clearly outline the timing and conditions for payments to partners in any partnership agreement.

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

- inform the Coordinator of any changes to their name, address, legal representative, legal, financial, technical, organisational or ownership situation;
- inform the Coordinator of any event likely to affect or delay the implementation of the project; and
- submit any data, documents or information required for UK NA reporting, audits, checks, monitoring or evaluation in good time to the Coordinator..

5.3. Mobility Tool+

The Mobility Tool+ is the online management and reporting system that all Coordinators must use to manage and report on their KA2 project. 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 Report, Interim report (if available in Mobility Tool+ and for the cases specified in your Grant Agreement Special Conditions Article I.4.3) and Final reports. It will be very important that the Mobility Tool+ is kept up to date at all stages of your project life cycle and that the information is accurate.

For further information please refer to the Mobility Tool+ User Guide, which could be found on <https://www.erasmusplus.org.uk/youth-projects> under the Reporting or Key Documents section.

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 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/>

Youthpass

Youthpass is a European recognition tool for non-formal and informal learning in youth work, developed by SALTO, initially for the Youth in Action programme. The SALTO Network organises training and contact-making activities to support organisations and National Agencies within the frame of the European Commission's Erasmus+ :Youth in Action programme (You can check the European training calendar on the Salto Youth website: <https://www.salto-youth.net/>) The UK NA strongly encourages beneficiaries to use Youthpass for projects funded by Erasmus+ in the field of

youth to help participants to record their learning and skills development, which can then be used to support job applications or applications for further courses.

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

Europass

If your KA2 project includes elements linked to employability, you could consider the use of Europass to validate the skills that your participants gained during the project. Europass is a European-wide initiative which aims to help individuals to present and document their skills and qualifications in a clear and transparent way throughout Europe. Europass consists of five documents (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.

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

5.6. Dissemination and Exploitation of Results

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

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

Tangible results may include:

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

Intangible results may include:

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

Dissemination is an essential part of all Erasmus+ funded projects and aims to raise awareness about your project, its activities and outcomes. All beneficiary organisations and their participants

(where applicable) should be actively involved in dissemination activities. Beneficiary organisations should disseminate their findings and look to exploit project results via formal and informal networks. Any good practice or lessons learned through the project should be implemented within the beneficiary organisations and, where possible, disseminated through their wider local, regional, national and/or European networks.

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

Erasmus+ Helpline Tel: 0121 212 8947

Erasmus+ Helpline Email: erasmusplus@ecorys.com

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

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

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

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

Erasmus+ Project Results Platform

The [Erasmus+ Project Results Platform](#) (PRP) is a dissemination platform developed by the European Commission which is mandatory for all KA2 Erasmus+ projects. It offers a comprehensive overview of projects funded under the programme and highlights best practices. The platform serves as a useful tool in disseminating the outcomes of your project and makes available any tangible resources, products, deliverables and outputs which have resulted from funded projects.

Your project summary will automatically be published once your grant agreement has entered into force, and you will need to upload your final project results onto the platform before the end of the project. This is a contractual requirement as mentioned in Grant Agreement, Special Conditions, Article I.9., and in Annex I, General Conditions, Article II.9.3. It will be checked as part of the assessment of your final report. However, uploaded outputs/ results will not be openly visible until the final report is validated by the UK NA.

Erasmus+ Logo

You must publicly acknowledge the support received from the European Union by including the European Commission's Erasmus+ logo on any project outputs or promotional materials. Article II.8 of Annex I, General Conditions, contains information about the Visibility of Union funding. Further information and links to the Erasmus+ programme logos can be found on the Erasmus+ website: <https://erasmusplus.org.uk/news/how-to-use-the-erasmus-logo>.

The preferred option to communicate about EU funding is to write 'Co-funded by the European Union' next to the EU emblem on the communication material where the EU emblem is used. The programme logo should comply with the requirements of the Graphic Design User Guide for Erasmus+ available at http://ec.europa.eu/dgs/education_culture/promotional_en.htm

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

Intellectual Property Rights

As mentioned in Article II.9 of Annex I, General Conditions, 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

The Grant Agreement specifies that any educational resources 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 through open licences.

6. National Agency Monitoring Activities

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

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

6.1. Record Keeping

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

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

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

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

6.2. Audits, Checks & Monitoring Visits

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

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

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

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

The beneficiaries must keep all original documents, especially accounting and tax records, stored on any appropriate medium, including digitalised originals when they are authorised by their respective national law and under the conditions laid down therein, during a period of five years starting from the date of payment of the balance.

Monitoring Visits

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

The key areas for discussion are likely to be:

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

- Financial information.

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

The information gathered during the visit will be used to inform reports produced for the UK Department for Business, Energy & Industrial Strategy (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 the visit you will be sent a draft visit report and you will have 30 days to comment on this before the report is finalised.

On the Spot Checks during the Project

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

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

On the Spot Checks after Completion of the Project

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

Desk Checks

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

Final Report Checks

In addition to any of the above checks, the project Coordinator will need to submit a final report to the NA within 60 days of the project end date which is outlined in the grant agreement. All final reports will be checked at the UK NA premises in order to establish the final approved grant amount for the project.

7. Financial Management

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

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

You can find information regarding the maximum grant amount awarded to your project in Annex I, Special Conditions Article I.3 of your Grant Agreement. Annex II provides a breakdown of each budget heading as well as the project’s total costs and grant.

It is important to note that the total project’s grant will not be the arithmetic total of each budget heading if the project’s total calculated costs are higher than the maximum grant awarded. For example, if a two year project’s total costs are €310,000, the maximum grant which can be awarded is €300,000 as the maximum monthly grant has a cap of €12,500 a month (€12,500 x 24 months =

€300,000). In this case the amounts awarded to the individual budget headings will not have been amended, however the grant is set at the maximum amount permitted. A further example of this may include projects which have included Exceptional Costs at 100% of their value, under the related category, however only 75% of this value can be awarded in accordance to programme rules.

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

7.1. Project Management and Implementation

Costs eligible under this budget category include staff costs for general project management (e.g. planning, coordination, finances, communication), small-scale training/teaching/learning materials and approaches, virtual cooperation and local project activities, in-house printing (e.g. brochures, leaflets) and information, promotion and dissemination (i.e. website). Costs associated with Managers and Administrative staff is expected to be covered under Project Management and Implementation rather than in Intellectual Outputs budget category (where applicable).

At 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 grant under this budget category to cover costs associated with attending a project management meeting organised by the UK NA where the UK NA provides advice on the implementation of the Key Action, grant management and contractual reporting. Such costs have to be incurred during the contracted period of the project, as set out in Article I.2. A of Annex III.

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

7.2. Transnational Project Meetings

The budget awarded under this heading is a contribution towards the travel and subsistence costs associated with meetings held between you and your partners at the location of one of your

partners' organisations or 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 (if it 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.

Please see Annex III of your agreement, and section 4.2 of this document for further details. All coordinators must be aware that there is a risk that the change will not be approved if the NA believes that it has not been sufficiently justified.

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 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 both the associated 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 (following the Commission's online distance calculator).

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

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

As supporting documents you need to keep proof of attendance of the transnational project meeting 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: name, e-mail address and signature of the person, name and address of the sending organisation of the person as well as detailed agenda and any documents used or distributed at the transnational project meeting.

If the place of origin and/ or venue reported is different from a) the place of residence of the participant or b) the place where the receiving organisation is located, you will need to explain the reason for this difference in Mobility Tool+. In this case you will also need to retain your travel itinerary, including all travel tickets and invoices, specifying the place of departure and arrival, as well as obtain signed declarations from the hosting partner.

7.3. Intellectual Outputs

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

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

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

In order for costs to be eligible, partners need to be able to demonstrate a formal link (on a professional or voluntary basis) with the persons for which staff costs are being claimed. To demonstrate this formal link, you need to keep proof of the nature of the relationship (i.e. employment contracts or volunteer agreements). Timesheets for each person will also need to be kept as per Article I.2 of Annex III.

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

Please note that people working for the organisation on the basis of a service contract (e.g. translators, web designers, etc.) are not considered as staff of the organisation. Therefore, their staff time cannot be claimed under Intellectual Outputs. Staff costs incurred by individuals external to the partner organisations belong under the Exceptional Costs budget category and should only be claimed if included in the application and approved in the project's budget.

7.4. Multiplier Events

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

Multiplier Events funding does not cover general project-related events such as press conferences, however these can be covered under the Project Management and Implementation budget. To support any Multiplier Event costs, you will need to describe each Multiplier Event in your Final Report, to keep proof of attendees for each event in the form of participant lists, and to keep an agenda and other documents distributed at the event. Please see Article I.2 of Annex III for further details.

If you did not produce a planned Intellectual Output, any related Multiplier Events 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.

7.5. Special Needs Support

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

For Special Needs Support, you must report in the Mobility Tool+ on the type of additional costs and the actual amount incurred to support disabled participants. To support the claimed costs you will need to keep invoices, as specified in Article I.2.A of Annex III.

7.6. Exceptional Costs

Any grant awarded under Annex II for Exceptional Costs can be used for expensive travel costs of participants from outermost regions and [Overseas Countries and Territories](#) (OCTs) subcontracting requirements and costs related to the depreciation of equipment, as long as these are specified in your approved application. For Exceptional Costs, you need to report the actual costs incurred in Mobility Tool+.

The UK NA will reimburse 75% of the eligible costs actually incurred or up to €50.000 (excluding costs for providing financial guarantee), whichever is the lowest.

The UK NA will reimburse 80% of the eligible costs for expensive travel costs of participants from outermost regions and OCTs.

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. In the case of the costs for travel for participants from outermost regions and OCTs, you will need to provide invoices. Please see below and Article II.2.B of Annex III for further details.

Please note that the UK NA will only validate exceptional costs that have been approved as per the application, if any.

Equipment

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

Subcontracting

As per Annex I General Conditions Articles II.11 and II.12 of your Grant Agreement, where applicable, all projects need to evidence that any subcontracting contracts were awarded to the tender offering best value for money or, as appropriate, to the tender offering the lowest price. Please note that this is the case even when a subcontractor was specifically named within in your original application. In doing so, it is important to avoid any conflict of interest. This rule applies in all instances.

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

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

Travel

In the case of the costs for travel for participants from outermost regions and OCTs, for which the standard funding rule does not cover at least 70% of the eligible costs, proof of payment of the related costs on the basis of invoices specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice must be provided.

7.7. 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 associated costs 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 cost.

Transnational Training, Teaching and Learning Activities must take place in the countries which have been approved in your application. Activities associated with learners as well as long-term activities of staff or Youth Workers from or to Partner Countries are not eligible. Participants can take part in an activity held in their own country, and receive funding providing the that the distance

between the place of departure and place of arrival is at least 100 km as per the online distance calculator and 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, or Young People in Blended Mobility; and
- Professors, Teachers, Trainers, educational and administrative staff employed at a participating organisation, or Youth Workers.

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

Travel

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

When claiming travel costs you will need to report on the number of participants in each activity on the Mobility Tool+, the dates of the activity and enter the appropriate 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. If applied and it has been 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 should be recorded on Mobility Tool+ as Travel Days. The Mobility Tool+ will calculate the grant amount automatically.

As supporting documents, you need to keep a declaration signed by the receiving organisation specifying the name of the participant (e-mail address for KA2 for youth), the purpose of the activity and the dates within which the activity took place. If the place of departure and/or arrival reported are different from the place where the sending organisation (for departure) and the place where the receiving organisation (for arrival) are located, you need to provide a justified reason for this difference in Mobility Tool+. In this case you will also need to keep all travel tickets and invoices, specifying the place of departure and arrival, as well as obtain signed declarations from the receiving partner. Please see Article I.2. E.c).(i) in Annex III of your agreement for further details.

Individual Support

Individual Support is intended to cover subsistence costs incurred by participants, including accompanying persons, taking part in your project's transnational activities. Details of each

participant will have to be input onto 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.

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

Linguistic Support

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

On 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 I.2.E.c).(iii) of your agreement for further details.

If you did not originally apply for Linguistic Support, you may only transfer budget to accommodate Linguistic Support when the project has transnational Training, Teaching and Learning activities which are two months or longer in duration, specified within Annex II, Budget, Project Description, 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 (full article to be found in Annex I, General Conditions)..

Supporting Participants with Travel, Individual support and Linguistic Support

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

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

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

7.8. Documents to be Retained

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

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

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

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

As a minimum, you will need to collect and keep the documents specified in Articles 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 they may be requested in the event of checks and audits.

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

- as best practice, beneficiaries should retain any 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.27.2 of Annex I, General Conditions, you need to keep all original documents stored on any appropriate medium. This includes digitalised originals if they are authorised by the relevant national law.

7.9. VAT

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

In addition:

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

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

7.10. Budget Transfers

Beneficiaries are allowed to adjust the estimated budget set out in Annex II by transfers between themselves and between the different budget categories, if the action 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 as a significant change to the project which must, therefore, be submitted as a request to the UK NA. Significant changes to projects' budgets will only be approved in exceptional circumstances. For more information, please see section 4.2 of this document.

As per Article I.3.3, the budget headings Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Transnational Training, Teaching and Learning Activities can be increased up to a maximum of 20% of the amounts awarded to each.

However, Project Management and Implementation and Exceptional Costs **can not be** increased under any circumstances.

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

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

Table 2 below outlines the budget amendments which can be made in accordance to Article I.3.3. .

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

Table 2 – Budget Transfers

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

7.11 Ineligible Expenditure

As per Article II.19.4 in Annex I, General 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.

7.12. Exchange Rates

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

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

For projects that received a pre-financing payment, to convert any costs incurred in currencies other than Euro, as per Article I.4.10 in Special Conditions of your Grant Agreement, you should use the monthly exchange rate established by the Commission and published on its website ([\(\)](#)) on the day you received your pre-financing payment from the NA. You must use these exchange rates until the date of the next pre-financing payment, where the same process applies.

For projects without pre-financing, you should use exchange rates based on the monthly accounting rate established by the Commission and published on its website ([\(\)](#)) applicable on the day when the agreement is signed by the last of the two parties. You must use these rates until the end of your project.

European Commission Currency Converter:

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

8. 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 the Grant Agreement.

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

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

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

Please note that projects which are subject to a zero pre-financing payment structure will not receive any funds during the lifetime of the project. Funds will be released within 60 calendar days of receipt of a satisfactory Final Report and its associated documentation to the UK NA. Progress and Interim Reports will still be required as outlined in Special Conditions Articles I.4.3 and I.4.4 of your Grant Agreement.

9. Progress Report

A sample of KA2 projects will be required to submit a Progress Report to the UK NA if available via Mobility Tool+. Article I.4.3 (Special Conditions of your Grant Agreement) outlines the reporting requirements for your project.

If your project is required to submit a Progress Report the UK NA and it is not available in Mobility Tool+, the UK NA will issue a report template for your completion. The report template will be made up of a qualitative and financial section which will be used to assess the extent to which your project is being delivered in line with your original application.

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

10. Interim Report

All KA2 projects with a project duration of two years or longer are required to submit an Interim Report. Article I.4.3 of your Grant Agreement Special Conditions outlines the reporting requirements for your project.

Under the 2016 Call, the Interim report will need to be submitted if available in Mobility Tool+. Further guidance on how to complete and submit your Interim Report via the Mobility Tool+ will be produced once the tool and report forms are released by the European Commission. If it will not be available to submit it via Mobility Tool+, the UK NA will issue you with a report template for completion.

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

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

11. Final Report

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

Under the 2016 Call, Coordinators will need to complete a Final Report via Mobility Tool+ on the implementation of the project, and upload all project results onto the Erasmus+ Project Results Platform as specified in Article I.9.2 of Special Conditions.

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

Your Final Report will be made up of a qualitative and financial section which will be used to assess the extent to which your project was delivered in line with your original application. Once the UK NA has assessed your Final Report, you will receive feedback along with confirmation of the amount of any final payment due to you or any refund due to the UK NA.

The Final Report will be assessed on the basis of set quality criteria and scored out of a maximum of 100 points. If the Final Report scores less than 50 points in total, the UK NA will reduce the final grant amount on the basis of poor, partial or late implementation of the project, even if all activities reported were eligible and actually took place.

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

- the extent to which the project was implemented in line with the approved grant application;
- the quality of activities undertaken and their consistency with the project objectives ;
- the quality of the products and outputs produced;
- the learning outcomes and impact on participants;
 - The extent to which the project proved to be innovative/complementary to other initiatives
 - The extent to which the project 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 will be reduced for poor, partial or late implementation of the project. Reductions will be applied to the final total of eligible costs on the following basis:

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

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

12. More Help and Advice

If you have any queries please contact the Erasmus+ Helpline on 0121 212 8947 or email erasmusplus@ecorys.com and a member of the wider team will respond. Our office hours are Monday to Thursday 09:00 - 17.30 and Friday 09:00 - 17:00. You can expect a response from us within two working days.

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