ERASMUS

CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

Key Action 2 (KA2) Guide for Applicants

Strategic Partnerships in the Field of Adult Education

Deadline: 11am (UK time) on Wednesday 21 March 2018

Version 1:

BRITISH COUNCIL ECORYS Erasmus+

Erasmus+ is the European Union programme for education, training, youth and sport.
The Erasmus+ UK National Agency is a partnership between the British Council and Ecorys UK.

ERASMUS+
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

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Overview of changes to the guide

This document is **version 1** of the 2018 Key Action 2 (KA2) Guide for Applicants for Strategic Partnerships in the field of Adult Education under the 2018 Call. If future versions of the Guide for Applicants are created, the table below will record an overview of changes made compared to previous versions:

Page number in previous version	Change	Page number in this version

PART I - PREPARATION

Introduction to Key Action 2: Cooperation for Innovation and the Exchange of Good Practices

Erasmus+ is open to organisations across all sectors of education and training. Any public, private or not-for-profit organisations actively involved in these areas may apply for funding. The overall programme objectives are to:

- boost skills and employability;
- modernise education, training and youth work; and
- focus on young people.

Key Action 2: Cooperation for Innovation and the Exchange of Good Practices is all about enabling organisations to work together in order to improve provision for learners and share innovative practices within and beyond the participating organisations. Under Key Action 2, organisations can apply for funding to work in partnership with organisations from other participating countries. The projects funded under this Key Action will focus on sharing, developing and transferring innovative practices in education, training and youth provision between participating countries. Key Action 2 aims to increase the positive impact of European activities at all levels to ensure benefits for the individuals, organisations and countries involved in projects.

Key Action 2 for Adult Education

UK organisations active in the field of Adult Education can apply for funding under Key Action 2 for activities that form part of Strategic Partnership in Adult Education. Each project can last between 12 and 36 months[1] and organisations can apply for funding to support a combination of activities, depending on the objectives of the project.

Strategic Partnerships can fall into one of two categories:

- Strategic Partnerships developing innovation[2]; or
- Strategic Partnerships supporting exchange of good practices[3]

Project activities must contribute to achieving the project objectives and should be proportionate to the scale and type of project, and relevant to action priorities. Some examples of the types of activities a Strategic Partnership in the field of Adult Education can deliver are included on page 291 of the of the European Commission's Erasmus+ Programme Guide (pdf version). It is also possible to have cross-sectoral Strategic Partnerships involving partner institutions from different sectors of education,

[1] The latest possible end date for activities is 31 August 2021. Therefore, depending on your project's start date, you may not be able to apply for the full 36 months duration.
[2] Also referred to as 'Innovation' or 'Supporting Innovation' projects.
[3] Also referred to as 'Exchange of Practices' projects

training and youth working together to achieve objectives and results that will impact on the field of Adult Education. Examples of cross-sectoral Strategic Partnership activities are provided on page 289 of the Programme Guide. Where Strategic Partnerships submitted under the field of Adult Education include partners from other sectors, it is important to provide a strong rationale for the choice of partners within the application and to ensure that all partners have the skills and expertise to deliver a quality project which will impact on Adult Education.

Strategic Partnerships are a flexible way of working with partners from different countries and are expected to result in the sharing, development, transfer, and/or implementation of innovative practices at organisational, local, regional, national or European levels. Strategic Partnerships in the Adult Education field must focus on activities designed to improve Adult Education provision across the participating countries.

Who is this guide for?

This step-by-step guide is to help UK organisations complete the 2018 Erasmus+ Key Action 2 Strategic Partnerships for Adult Education (AE) application form under the 2018 Call, and should be read in conjunction with the 2018 Erasmus+ Programme Guide – Version 2.

This guide is for organisations considering applying for funding for Strategic Partnerships where the main sector impacted by the project will be Adult Education. If you wish to apply for funding for a Strategic Partnership in another field or for a project under a Key Action 1 or 3, please see the 'Apply for Funding' pages on the Erasmus + UK website.

Please be aware that there is no separate application form for cross-sector applications. Organisations must apply using the application form for the main sector impacted by the project and respect the applicable rules in terms of eligibility of organisations and activities. If you are unsure which sector your project would be most relevant to, please refer to the Strategic Partnerships action priorities outlined on pages 106 – 110 of the Programme Guide and have a look at the Erasmus+ UK website for further information.

Erasmus+ and Brexit

The UK Government has stated publicly that, subject to successful negotiations, the United Kingdom will continue to benefit from Erasmus+ until the end of the current programme in 2020. It will underwrite successful bids for Erasmus+ funding that are submitted while the UK is still a Member State, even if they are not approved until after we leave, and/or payments continue beyond the point of exit.

UK organisations wishing to apply for funding in 2018 should prepare for participation as usual ahead of the 2018 application deadlines. More information is on the Brexit webpage at www.erasmusplus.org.uk/brexit-update

Before you begin

Before you begin your application, you will need to:

1. Read more about Strategic Partnerships and this type of project
2. Check that you are an eligible organisation
3. Find appropriate partners
4. Review your organisational and financial capacity
5. Check whether your organisation has a PIC (Participant Identification Code)
6. Register on the European Commission's Participant Portal
7. Upload or update the Legal Entity Form and Financial Identification Form
8. Understand the quality criteria against which your application will be assessed
9. Understand the Strategic Partnerships budget

1. Read more about this type of project

What are Strategic Partnerships?

Strategic Partnerships aim to support the development, transfer and/or implementation of innovative practices as well as the implementation of joint activities promoting cooperation, peer learning and exchange of practice at organisational, local, regional, national or European levels. Under the Erasmus+ programme, Adult Education institutions can work with others to help improve Adult Education across Europe. Adult Education institutions can work with range of organisations, such as, enterprises, social partners and local or regional authorities to deliver high quality provision.

Erasmus+ offers flexibility in terms of the activities that Strategic Partnerships can implement, as long as the application demonstrates that these activities are the most appropriate to reach the objectives defined for the project.

Depending on the project objectives and the composition of the partnership, projects may be one of the following two types:

- **Strategic Partnerships supporting exchange of good practices:**
  The main objective of these projects is to allow organisations to develop and reinforce networks, increase their capacity to operate at a transnational level and exchange ideas, practices and methods. Depending on their objectives, projects may also develop tangible outputs, and are still expected to disseminate the results of their activities in a way that is

proportionate to the aims and scope of the project. These results and activities will be co-financed through the standard Project Management and Implementation budget and no separate funding will be available to develop Intellectual Outputs or Multiplier Events.

- **Strategic Partnerships supporting innovation:**
  These projects are expected to develop innovative outputs and/or undertake intensive dissemination and exploitation activities. Strategic Partnerships supporting innovation can request specific funding for Intellectual Outputs and Multiplier Events in order to support the delivery of their objectives.

How to choose which type of Strategic Partnership to apply for?

Applicants will need to select the type of Strategic Partnership they wish to apply for at application stage. However, this should be discussed with partners during the initial planning stages, taking into consideration the proposed objectives and activities of the project, and the size, capacity and experience of the partnership. Although not a requirement, applicants or partnerships with less organisational capacity and/or less experience of European partnership working may wish to consider applying for a Strategic Partnership supporting the exchange of good practices as a first step. These projects allow organisations to gain experience of transnational cooperation and to deliver joint outcomes and results, without the requirement to deliver substantial, high quality, innovative Intellectual Outputs.

In all cases, applicants should choose the project format which is most appropriate for delivering the planned project objectives and results. All applications will be quality assessed in line with the proportionality principle. This means that the scores allocated for the quality award criteria will take into consideration the size and type of the project and the composition and experience of the partnership.

Addressing the priorities of the Action

Important note: In order to be funded all Strategic Partnerships **must** address either a) at least one horizontal priority or b) at least one specific priority relevant to the field /sector of education, training and youth that is mostly impacted. Please refer to the detailed action priorities outlined in the Programme Guide, pages 106 – 110.

When planning your project it is important to be clear from the outset about which action priority (or priorities) your project will address and, importantly, **how** they will be addressed. This should be clearly explained within the narrative of the application form.

Horizontal priorities include:

- Development of relevant and high quality skills and transversal competences

- Social inclusion in education, training, youth and sport activities
- Open education and innovative practices in a digital era
- Strengthening the recruitment, selection and induction of educators
- Transparency and recognition of skills and qualifications to facilitate learning, employability and labour mobility
- Sustainable investment, performance and efficiency in education, training, youth and sport
- Social and educational value of European cultural heritage in relation to job creation, economic growth and social cohesion.

Important note: If your application aims to address one of the horizontal action priorities you still need to clearly demonstrate how the project is relevant to and will impact on Adult Education. Projects which clearly address the horizontal priority relating to 'Social Inclusion' within the narrative of the application will be considered highly relevant. Within this priority, particular attention will be given to projects addressing gender differences in relation to ICT. Please refer to the Programme Guide, page 107, for more detail on this priority.

Adult Education field-specific priorities:

In the field of Adult Education, in line with the ET2020 and European Agenda for Adult Learning priorities and the Council recommendation on Upskilling Pathways: New Opportunities for Adults, priority will be given to:

- Improving and extending the supply of high quality learning opportunities tailored to the needs of individual low-skilled or low-qualified adults so that they enhance their literacy, numeracy and digital competences, key competences and/or progress towards higher qualifications, including through the validation of skills acquired through informal and non-formal learning, or progress towards higher qualifications;

- Facilitating access to upskilling pathways by making available skills identification and screening, learning offers adapted to individual learning needs, and through the validation of skills acquired through informal and non-formal learning;

- Increasing the demand and take-up through effective outreach, guidance and motivation strategies which encourage low-skilled or low-qualified adults, to develop and upgrade their literacy, numeracy and digital competences and skills and/or progress towards higher qualifications;

- Extending and developing educators' competences, particularly in the effective teaching of literacy, numeracy and digital skills to low-skilled or low-qualified adults, including through the effective use of ICT.

- Developing mechanisms to monitor the effectiveness of adult learning policies or to track and monitor the progress of adult learners.

You can find full details of the horizontal and Adult Education-specific action priorities in the Programme Guide. Please refer to these carefully before completing your application.

For an overview of the European policy in the field of Adult Education you can refer to: http://ec.europa.eu/education/policy/adult-learning/index_en.htm.

Other useful reference documents can be found on pages 322 - 333 of the Programme Guide and in Annex III of the 2018 Guide for Experts. Below are some examples:

- European Agenda for Adult Learning: http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.C_.2011.372.01.0001.01.ENG

- Rethinking Education: Investing in skills for better socio-economic outcomes: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2012:0669:FIN:EN:PDF http://ec.europa.eu/education/policy/strategic-framework_en

- Europe 2020 and ET 2020 benchmarks and indicators: http://ec.europa.eu/eurostat/statistics-explained/index.php?title=Europe_2020_indicators_-_education&oldid=301033%20

- Education and Training Monitor: http://ec.europa.eu/education/policy/strategic-framework/et-monitor_en

- Upskilling Pathways: New Opportunities for Adults: http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:JOC_2016_484_R_0001

- Languages for Jobs – Providing multilingual skills for the labour market: http://ec.europa.eu/languages/policy/strategic-framework/documents/languages-for-jobs-report_en.pdf

Applicants are also encouraged to visit the ePlatform for Adult Learning in Europe (EPALE) to support the development of their projects. EPALE is a multilingual, open membership, online community aimed at those who deliver and organise Adult Education. It provides a range of useful resources and tools and information, including information on Adult Education policy and developments.

What does a Strategic Partnership involve?

Depending on the type of Strategic Partnership you choose to deliver, your project could include the following types of activities:[4]

- activities that strengthen cooperation and networking between organisations;
- exchanging best practices;
- activities aimed at developing, testing and implementing innovative practices such as new curricula, tools or training materials or tools and methods for the professional development of adult educators;
- activities aimed at improving the accessibility of learning opportunities for adults;
- activities aimed at providing flexible pathways for adult learners, including basic and transversal skills and the validation of prior learning.

If you choose to deliver a **Strategic Partnership supporting innovation**, you will be expected to develop innovative outputs and approaches. For this type of Strategic Partnership it is important that you are able to demonstrate how the practices you would like to share or develop with prospective partners will provide innovative solutions to the needs identified in your application. An innovative and/or complementary project can broadly be described as one where:

- new or additional needs are addressed;
- new or additional products or Adult Education practices are shared or developed;
- new or additional receiving countries, target groups or sectors are involved; and/or
- new or additional methods for delivering innovation or sharing approaches are used.

Strategic Partnerships developing innovation may include:

- developing, testing and/or implementing innovative practices relevant to the field of Adult Education, such as:
    - new curricula, courses and accompanying learning materials and tools for adult learners;
    - new forms of adult learning and providing Adult Education, notably strategic use of open and flexible learning, virtual mobility, open educational resources and better exploitation of the ICT potential;
    - learning and teaching methodologies and pedagogical approaches for adult learners, especially those delivering key competences and basic skills, language skills and focusing on the use of ICT;
    - tools and methods for professional development of Adult Education teachers and staff, with particular focus on improved initial education and in-service training for Adult Education teachers.

[4] This is not an exhaustive list .Refer to Part B of the Erasmus+ Programme Guide, pg. 106, and Annex I from the pg. 289 for further examples. Ensure activities are relevant to the action priorities.

Training, teaching and learning activities for Adult Education learners and staff can also be organised, as long as they help to achieve the objectives of the project and bring clear added value. However, learning mobility of individuals should not be the main focus of a Strategic Partnership project. If you are interested in a project that focuses purely on providing learner or staff development experience through transnational mobility, you should consider a Key Action 1 project. See the 'Apply for Adult Education Staff Mobility funding' page on the Erasmus+ website for more details.

Within a Strategic Partnership for Adult Education, where justified, training, teaching and learning activities may take the form of:

- **Blended mobility of adult learners**, where adult learners from partner organisations work together through both ICT tools, such as social media, video conferencing, live streaming etc., and through physical meetings. The physical meetings element of blended mobilities can last from a minimum of 5 days up to 2 months (excluding travel days), but the virtual element may last for the whole of the project duration.

- **Long-term teaching and training either assignments**, where staff teach or work alongside other staff in an Adult Education institution or relevant organisation. This can include teaching placements, participation in seminars or structured courses or observation periods. Teaching and training assignments must last between 2 and 12 months.

- **Short-term joint staff training events**, where partners can arrange training sessions for small groups of staff from each of the partner organisations. Joint staff training events must last between 3 days and 2 months (excluding travel days).

Participants in teaching, training and learning activities must have a link with the organisations participating as funded partners in the project. For example, they should be staff or learners of the participating organisations. Please refer to the eligibility criteria on page 114 of the Programme Guide for more information.

Strategic Partnerships in the field of Adult Education

We recommend that you read the information below and the European Commission's Erasmus+ Programme Guide to find out more about Strategic Partnerships for Adult Education, including the eligibility and quality assessment (award) criteria, application procedures and formal requirements.

For Strategic Partnership applications, the relevant sections of the Erasmus+ Programme Guide are:

- Page 25 (pdf version, general information on Education and Training projects, including Erasmus+ objectives and priorities);
- Pages 106 to 127 (pdf version, specific information on requirements for Strategic Partnerships in Education, Training and Youth), including:
    - Eligibility and quality assessment criteria, pages 112 to 116 (pdf version)
    - Funding rules, pages 118 to 127 (pdf version)

- Pages 244 to 262 (pdf version, information for applicants, including procedures and formal requirements);
- Pages 289 to 300 (pdf version, specific information on Strategic Partnerships, including activities and examples of projects).

Compulsory criteria and additional useful information, as well as project examples relating to Strategic Partnerships, can be found in Annex 1 of the Programme Guide. Interested organisations are strongly advised to carefully review the relevant sections of this Annex before submitting an application.

For inspiration and good practice examples, you can also search for projects on the Erasmus+ Project Results Platform.

2. Check that you are an eligible organisation

Erasmus+ Adult Education funding is open to any public or private organisation active in the fields of education, training and youth or any public or private organisation active in the labour market, for example:

- a not-for-profit organisation or NGO;
- a public body at local, regional or national level;
- a public or private, a small, medium or large enterprise (including social enterprises);
- a school/institute/educational centre;
- a cultural organisation, library, museum;
- a body providing counselling or information services;
- a body validating knowledge, skills and competences acquired through formal or non-formal learning; and
- enterprises providing shared training (collaborative training).

Applicant organisations must be based and registered in a Programme Country. UK Establishments/overseas organisations are not eligible to apply for Erasmus+ funding in the UK. This is because a UK establishment takes the legal status of the overseas company and has no separate legal personality. Organisations from Partner Countries can participate in KA2 projects as partners, **only** where their participation can be shown to bring essential added value to the project. For more information, please see the specific eligibility criteria for Key Action 2 Adult Education projects on page 112 - 114 of the Erasmus+ Programme Guide (pdf version).

Important note: Following the outcome of discussions between the National Authority for the Erasmus+ Programme in the UK and the European Commission, it has been confirmed that UK organisations can participate in Erasmus+ projects as a project partner or as an applicant, as long as they have a legal personality.

In order to be considered an eligible 'participating organisation', UK organisations participating in Erasmus+ Adult Education projects as a project partner or as an applicant (including all members of a UK consortium), must be able to evidence at application stage that they are legally registered in the United Kingdom and have a separate legal personality (legal distinction between the owner and the business). Therefore, unincorporated organisations are not eligible to participate in Erasmus+ projects under the field Adult Education. The only exception to this rule is for projects submitted under the field of Youth regarding informal groups of young people involved in youth work, and unincorporated charities that are legally registered with the Charity Commission.

In depth checks have been put in place in order to check the legal status of participating organisations in 2018. If you are unsure about the eligibility of your organisation's legal status, you are advised to check with the UK NA before submitting your application, as we will not be able to accept any changes to the organisation's legal status once the application has been submitted.

2.1 Other relevant eligibility criteria

Please read all the information in the 2018 Call Programme Guide, Part C – Information for Applicants carefully before completing your application.

Exclusion Criteria

Please ensure that you and your partners, where applicable, have read and understood the Exclusion Criteria in the Programme Guide.

An applicant will be excluded from participating in calls for proposals under the Erasmus+ Programme or will be rejected from the award procedure if it is found in one of the situations described in the Criteria as referenced on pages 245 - 250 of the Programme Guide (pdf version).

Double Funding

Organisations must ensure that Erasmus+ funding is used to deliver the activities that are set out in their application. In cases where organisations are receiving other funding from other sources to deliver similar activities, including from other EU funding programmes, you must indicate in the relevant section of the application form the sources and amounts of any other funding received or applied for in the year, whether for the same project or for any other project including operating grants.

Erasmus Charter for Higher Education (ECHE) Accreditation

In order to participate in Erasmus+ projects, Higher Education Institutions (HEIs) such as universities and other organisations whose core work is in the field of Higher Education, must hold the Erasmus Charter for Higher Education (ECHE). This includes HEIs from Programme Countries participating as funded partners in Erasmus+ projects. You can find further information about the Erasmus Charter for Higher Education on our website.

Uniqueness of Applications

Identical or very similar applications submitted by the same applicant or by other partners of the same consortium will be subject to a specific assessment by the UK National Agency in order to exclude the risk of double funding. Applications which are submitted more than once in the same round by the same applicant or consortium, either to the same Agency or to different Agencies, will all be rejected. Where the same or very similar applications are submitted by other applicants or consortia, they will be carefully checked and may also be rejected on the same grounds.

3. Find appropriate partners

Strategic Partnership projects must have a minimum of three partners from three different Programme Countries in order to be eligible. It is important to have a strong and reliable partnership in place in order to deliver a successful and high quality project. Applicants should ensure that the partnership includes an appropriate mix of relevant partners, with the capacity, skills, experience and expertise to deliver the project objectives and activities to a good standard.

You may want to consider including partners with a mix of experience of European cooperation in your project, including, where appropriate, organisations that are new to Erasmus+ and/or European partnership working and will therefore gain particular benefit from their involvement. Within the application, you will need to provide a clear rationale for selecting your partners.

It is possible to include partners from other fields of education, training and youth in a Strategic Partnership for Adult Education, where this is necessary in order to achieve the project objectives. If this is the case, you should make it clear within your application why the inclusion of partners from other fields is necessary and how this will add value to the project and help to achieve the planned objectives, results and outcomes, which will deliver impacts for Adult Education.

When looking for potential partners you can seek recommendations from trusted partners and/or exploit known links and networks. You can also search for complementary organisations with experience of Erasmus+ and its predecessor programmes via the Erasmus+ Project Results Platform or use the partner-finding tool on the EPALE platform.

However you find your partners, it is important to get to know them and to understand their skills, experience and capacity to participate in the project. All partners should be fully committed to the project and understand their roles and responsibilities. To ensure that you develop a good quality, achievable joint project, all partners should be involved in the design of the project from the outset as well as supporting its delivery if the application is successful.

Strategic Partnerships can include partners from Partner Countries only if their participation will bring **an essential added value** to the project because of specific skills, experience or expertise which will be critical to achieving the project objectives and delivering high quality results and outputs. Please see pages 21 and 111 of the Programme Guide (pdf version) for further details. If you plan to include a partner from a Partner Country, you must ensure that the added value is clearly explained in the application as if this is not sufficiently justified the project will not be considered for funding. See page 131 of the Programme Guide (pdf version), Award criteria, Quality of the project team, for further information.

Although associated partners can be included in Strategic Partnerships where justified, it is not a requirement to include them and they should only be included where they have something relevant to contribute. The application should make it clear how any associated partners will support the delivery and/or dissemination or sustainability of the project. Associated partners are not formally considered partners in the project and will not receive funding. Please refer to page 111 of the Programme Guide for further information.

4. Review your organisational and financial capacity

4.1 What is organisational capacity?

Applicants need to demonstrate that they have adequate capacity to successfully deliver Erasmus+ projects and administer them in accordance with the grant agreement with the UK National Agency and the programme guide published by the European Commission.

The assessment of organisational capacity will consider:

- the management of the organisation (e.g. details and roles of staff involved in delivery, management of the organisation, including details of any finance and administrative support);
- its past history, if any, in delivering European Commission funded projects;
- the number of staff and volunteers who will be involved in managing the project;
- access to support networks (only for smaller groups); and
- the results of previous monitoring or audits by the UK National Agency.

The above must be detailed in the application form but, where necessary, further information may be requested.

The UK National Agency may limit the number of live projects an organisation manages at any one time if the organisation does not provide evidence of sufficient organisational capacity to successfully deliver them.

Important note: Any outstanding debt your organisation has with the UK National Agency (either the British Council or Ecorys) will impact upon the approval of your application and your ability to secure funding. You are, therefore, strongly advised to clear any outstanding debts with the UK National Agency before applying for funding.

Applicants will not be granted funding if, on the date of the grant award procedure, they are subject to a conflict of interest, are guilty of misrepresenting the information required by the UK National Agency as a condition of participation in the grant award procedure or fail to supply that information (see the section 'Exclusion Criteria' in Part C, pages 245 - 250 of the Programme Guide, pdf version).

4.2 What is financial capacity?

All Erasmus+ projects are co-funded and Erasmus+ grants may not cover all costs. The grant is intended to be **a contribution towards the costs of project implementation** and mobility activities. In most cases, projects are expected to be delivered and reported using a pre-financing payment or an advance. In certain circumstances, e.g. concerns regarding the financial capacity of the beneficiary or if the treasury situation of the EU funds on the "National Agency bank accounts" does not allow for a single first pre-financing payment to beneficiaries, the UK National Agency reserves the right to make staged payments or implement alternative payment structures.

A formal financial capacity check does not apply to public bodies or international organisations. Financial capacity checks will not normally be undertaken in cases where the grant request does not exceed €60,000. However, in cases where the NA has serious concerns about the financial capacity of an organisation, or where cumulative grant requests submitted by the same organisation for several projects exceeds €60,000, the NA may decide to do a financial capacity check and may ask the applicant organisation to submit the required supporting documents.

In all other cases, you must demonstrate that your organisation has suitable reserves or income to deliver the project successfully. You must therefore provide a set of accounts, to include at least a Balance Sheet and a Profit and Loss Account (or an Income and Expenditure Account), in accordance with relevant UK legislation, which is not more than 18 months old from the date of the round to which you are applying.

The accounts should show a balance sheet with sufficient free reserves (e.g. cash in bank account and debtors) which will exceed the amount of co-financing required and any additional shortfall, given the amount advanced as pre-financing, and the total cost of the project.

Please refer to page 248 of the Programme Guide for more information on financial capacity checks.

Payment structures

The UK National Agency will decide on the payment structure to be offered for each approved project based on a number of factors, including the type of project and the outcome of financial capacity checks. Instalments of the awarded grant, known as pre-financing payments, are paid during the lifetime of a project in order to provide beneficiaries with a float. The payment structure will normally be confirmed to beneficiaries when the grant offer is made or during the contracting process. Some examples of potential payment structures are provided below:

- Some projects may be offered one pre-financing payment at the start of the project, followed by a final payment of the balance following approval of a Final Report.
- In other cases, the pre-financing may be split into several smaller instalments which may be linked to the approval of interim reports submitted to the National Agency.
- In some cases pre-financing may not be offered, in which case the grant would be paid at the end of the project, following approval of the Final Report.

The expected timescales for pre-financing payments will be outlined in the grant agreement for the relevant project.

4.3 What if my organisation is new or has no accounts?

The UK National Agency may consider applicants who are recently established and/or have not prepared financial accounts, but priority may be given to established organisations who can demonstrate financial capacity.

4.4 What kind of bank account does my organisation need in order to receive Erasmus+ funding?

All Erasmus+ grants are paid in Euros, therefore it is recommended that you use a Euro bank account to avoid exchange rate losses. Some UK bank accounts can accept Euro payments directly, while others require payments to be routed via another bank or bank account. You are advised to check with your bank whether this is the case, as you will need to provide additional information about routing references to the UK National Agency if your application is successful, in order to ensure payments reach you without delay.

Other requirements regarding bank accounts include the following:

- Account Holder and Account Name - These must be in the name of the organisation (not an individual).
- IBAN Number – It is mandatory that the IBAN number for your bank account starts with GB for UK bank accounts or the account will not be able to receive payment.
- The Branch Address must be in the UK. It is important that the name of your bank account matches the name of your organisation so that payments can be made without delays.

5. Check whether your organisation has a PIC (Participant Identification Code)

All organisations applying for Erasmus+ funding must first register with the European Commission using the Participant Portal (see step 6 below) and receive a unique Participant Identification Code (PIC). The PIC is directly linked to the information that the organisation registers on the Portal and enables organisations to enter all their details into an application form simply by inserting the PIC code. The applicant organisation and all partners must have a PIC number in order to complete the application form.

Important note: Before registering on the Participant Portal you are advised to check that your organisation doesn't already have a PIC. You can use the search facility (under the Organisations tab) to make sure your organisation is not already registered. If your organisation is registered, you can use the existing PIC number and should not register again. This is because your organisation can have only one PIC and if it receives duplicate PICs, it can cause delays in processing your application. You should also make your partners aware of this before they register.

As part of the registration process, the Participant Portal will search for organisations that are the same or have similar information to your own and will allow you to email their contact person in case of any queries. However, to save time it is advisable to check beforehand that you do not already have a PIC, particularly if your organisation is large, with different departments or campuses.

Important note: Following guidance from the European Commission, in order to avoid or minimise potential misuse of organisational data, we strongly recommend that the domain address used in your email for the Participant Portal matches the legal signatory and the contact person's domain email address used in the application form (e.g. john.smith@abc.com and ana.rosi@abc.com)

If the email domain address in the application form is different from that provided in the participant portal, such applicants might be checked by the NA for correctness and validity of data provided either in the application form or in the Participant Portal (URF).

6. Register on the European Commission's Participant Portal

Registration is compulsory and you will not be able to submit the application form if you and your partners have not registered on the Participant Portal and obtained a PIC code. As mentioned above you and your partners need to check whether your organisations already have a PIC before registering again. If there is an existing PIC you should use this and update the information on the Participant Portal as required.

The Participant Portal is accessible via an individual or organisation's EU Login account[5]. If you have not previously registered your organisation on EU Login, you can access the User Guide by clicking here.

After registering on or logging into EU Login, you will need to register on the Participant Portal.

Important note: Please be aware that there are two portals: the Research Participant Portal and the Education, Audio-visual, Culture, Citizenship and Volunteering Participant Portal, which is the correct Participant Portal for Erasmus+. A normal internet search for the Participant Portal will lead you to the Research Portal by default, so make sure you use the link below in order to register and access the correct Participant Portal.

The **Education, Audio-visual, Culture, Citizenship and Volunteering Participant Portal** can be accessed at: http://ec.europa.eu/education/participants/portal/desktop/en/home.html.

Once you have registered your organisation and uploaded all the necessary documents, your organisation will receive a nine digit Participant Identification Code (PIC). When a PIC is entered into the application form, the organisation's details populate automatically, based on the information registered on the Participant Portal.

We would recommend that you test your PIC well in advance of submitting an application, as it can take time to resolve any issues with your PIC.

Please see the Erasmus+ Programme Guide, Part C Information for Applicants, from page 244 (pdf version) which contains detailed guidance on how to complete these steps.

Important note: You will be expected to use the Participant Portal throughout your project's lifetime and each time that you apply for Erasmus+ funding. Therefore, you should take measures to ensure that your organisation's data is correct and up to date and that you always have the login details to access the Portal.

7. Upload or update the Legal Entity Form and Financial Identification Form

Once registered, all organisations must have their legal status validated by the National Agency in their country; this applies to both applicants and partner organisations. Organisations cannot receive Erasmus+ funding until they have been validated. To enable the UK National Agency to validate your organisation, you will need to upload certain documents onto the Participant Portal.

[5] EU Login previously known as ECAS. If you are already registered on ECAS you can use these login details to access EU Login.

Both you and your partners must upload a Legal Entity Form to the Participant Portal as well as supporting documents for this form. The Legal Entity Form template can be found here: http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

Please be aware that there are three types of legal entity documents available: 'Individual', 'Private Company' and 'Public Entity'. Please choose the appropriate legal entity form, depending on whether your organisation is a 'Private Company' or a 'Public Entity'. **For KA2 Strategic Partnerships projects you should not use the 'Individual' legal entity form.** For more information/specific examples, please visit our website.

The Legal Entity Form must be completed in full and **must be accompanied by evidence of your organisation's legal status.** The supporting legal documents must be consistent with the information about your organisation provided on both the Participant Portal and the Legal Entity Form. For more information, please have a look on the FAQs section of the Participant Portal.

As an applicant, you will also need to upload a Financial Identification Form. You can find the Financial Identification Form template here:

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm

The Financial Identification Form should be signed, dated and stamped by your bank or alternatively should be accompanied by a recent bank statement for the given bank account. You should provide details for an account that your grant can be paid into and which is set up to receive payments in Euro. If your organisation is awarded funding, at a later stage you will be asked to upload a 'Refined Bank Details Form' and you will need to ensure that the information on the this form is consistent with the Financial Identification Form.

Please note that your organisation must be validated in order for your application to be considered for funding. However, validation is a separate process and not linked to the assessment of your application. Therefore, if your organisation is validated it does not automatically imply that your application has been successful.

If you have applied for Erasmus+ funding before and have already been validated by the UK National Agency you will still need to ensure that the above documents are correct and up to date. Outdated documents cannot be deleted but you can upload another document with the updated information. Please ensure that updated documents uploaded onto the Participant Portal are clearly named, including the date of update, to avoid confusion.

Private organisations applying for a grant of over €60,000 should also ensure that their most recent set of accounts are uploaded to the Participant Portal to enable a financial capacity check to be carried out. See page 248 of the Programme Guide (pdf version) for more information about financial capacity.

For more information about registering and uploading documents to the Participant Portal, as well as updating information and previously uploaded documents, please refer to:

https://ec.europa.eu/programmes/erasmus-plus/sites/erasmusplus/files/2017-manual-urf.pdf

Useful tip: Please note that any information included in the Legal Entity Form and Financial Identification Form must match the details in the application form and on the Participant Portal.

8. Understand the quality criteria against which your application will be assessed

In order for you to develop a high quality Key Action 2 application it is essential that you understand how your application will be assessed.

The assessment of applications is carried out in two stages:

1) A formal eligibility check undertaken by the UK National Agency staff
2) A qualitative assessment undertaken by external expert(s) who will have been selected based on their experience and knowledge of the Adult Education sector.

Please bear in mind that if you were unsuccessful in a previous round and intend to submit your application again, you will need to rework it taking into account the feedback given previously by the external assessors and referring to the current programme rules and action priorities, which may have been updated. You are not allowed to submit exactly same application twice, so make sure you review and improve your application before resubmitting it.

Experts will assess each section of the application form against the following award criteria:

Relevance of the project (maximum 30 points)	▪ The relevance of the proposal to:
	  ▪ the objectives and the priorities of the Action (see section 'What are the aims and priorities of a Strategic Partnership' on page 106 of the Programme Guide).
	  ▪ If the proposal addresses the horizontal priority 'inclusive education, training and youth' (i.e. Social Inclusion), it will be considered as highly relevant.
	  ▪ If the proposal addresses one or more 'European Priorities in the national context', as announced by the National Agency, it will be considered as highly relevant.[6]
	▪ The extent to which:

[6] **Please note:** there are no "European Priorities in the National Context" for KA2 Adult Education for the 2018 Call.

	▪ the proposal is based on a genuine and adequate needs analysis; ▪ the objectives are clearly defined, realistic and address issues relevant to the participating organisations and target groups; ▪ the proposal is suitable of realising synergies between different fields of education, training and youth; ▪ the proposal is innovative and/or complementary to other initiatives already carried out by the participating organisations; ▪ the proposal brings added value at EU level through results that would not be attained by activities carried out in a single country.
Quality of the project design and implementation (maximum 20 points)	▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, monitoring, evaluation and dissemination; ▪ The consistency between project objectives and activities proposed ▪ The quality and feasibility of the methodology proposed; ▪ The existence and relevance of quality control measures to ensure that the project implementation is of high quality, completed in time and on budget; ▪ The extent to which the project is cost-effective and allocates appropriate resources to each activity; ▪ If applicable, the use of Erasmus+ online platforms (i.e. eTwinning; EPALE; School Education Gateway) as tools for preparation, implementation and follow-up of the project activities. If the project plans training, teaching or learning activities: ▪ The quality of practical arrangements, management and support modalities in learning, teaching and training activities; ▪ The extent to which these activities are appropriate to the project's aims and involve the appropriate number of participants; ▪ The quality of arrangements for the recognition and validation of participants' learning outcomes, in line with European transparency and recognition tools and principles.
Quality of the project team and the cooperation	▪ The extent to which: ▪ the project involves an appropriate mix of complementary participating organisations with the necessary profile,

arrangements (max 20 points)	experience and expertise to successfully deliver all aspects of the project; ▪ the distribution of responsibilities and tasks demonstrates the commitment and active contribution of all participating organisations; ▪ if relevant for the project type, the project involves participation of organisations from different fields of education, training, youth and other socio-economic sectors; ▪ The extent to which the project involves newcomers to the Action. ▪ The existence of effective mechanisms for coordination and communication between the participating organisations, as well as with other relevant stakeholders. ▪ If applicable, the extent to which the involvement of a participating organisation from a Partner Country brings an essential added value to the project (if this condition is not fulfilled, the project will not be considered for selection).
Impact and dissemination (maximum 30 points)	▪ The quality of measures for evaluating the outcomes of the project. ▪ The potential impact of the project: ▪ on participants and participating organisations, during and after the project lifetime; ▪ outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels. ▪ The quality of the dissemination plan: the appropriateness and quality of measures aimed at sharing the outcomes of the project within and outside the participating organisations; ▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations; ▪ The quality of the plans for ensuring the sustainability of the project: its capacity to continue having an impact and producing results after the EU grant has been used up.

It is important to refer to the award criteria as you are planning and developing your project idea and not only as you complete the application form. Within the narrative of the application you should make it clear how each of the award criteria will be addressed.

Ensure that each section of the application is completed in full and that the activities comply with the Erasmus+ guidelines and the eligibility criteria (target group, venues of meetings, activity durations, partners and financial provisions). You should make sure that each answer refers to the question asked, avoid duplicating information and ensure consistency and clarity. Remember to proof read your application carefully before submitting.

Any relevant text you enter will be considered in the quality assessment. However, please try to be concise and give the most relevant details in the most relevant section of the form. All the key information about your project and the planned activities should be referenced within the application form.

Important note: Applications must score at least half of the available points for each of the four award criteria and score 60 or more points overall in order to be considered for funding. If either of these criteria are not met, the application will not be funded. For example, if an application scored 30 for relevance, 20 for quality of the project design and implementation, 20 for quality of project team, and 12 for impact, it would not be successful even though 82 is a good score overall. You should therefore make sure that your application is balanced and you give attention to all aspects of the project.

Approved projects will be ranked in terms of their overall assessment score, and the programme budget will be allocated from the highest scoring project down to the lowest scoring project until the budget is fully utilised. Approved applications which cannot be funded due to insufficient programme funds may be placed on a reserve list. If one or more applications score the same, they will be ranked based on the score they received under the 'Impact and dissemination' quality criterion. If the applications scored the same under this criterion they will then be ranked based on the score they received under the 'Relevance of the project', followed by 'Quality of project design and implementation' and then 'Quality of the project team and the cooperation arrangements'.

Proportionality

When assessing your application, assessors are asked to take into account the scale and type of your project, its outputs and the amount of funding requested in line with the proportionality principle. This means that in principle the larger and more complex your project is, the more experienced your partnership is, and the more funding you request, the higher the level of detail and clarity expected regarding your project, its activities and the requested budget. It is therefore essential that you give careful consideration to the type of Strategic Partnership you select in section B 'Context', and ensure this is the right option to achieve the aims and objectives of your project.

Other useful information

Annexe II of the Programme Guide contains useful information on dissemination and exploitation and Annex III provides a glossary of terms. You may also find it beneficial to read the European

Commission's Guide for Experts on Quality Assessment (the 'Guide for Assessors') which sets out the assessment process and the detailed quality criteria for the assessment of applications. Both documents, The Programme Guide and 2018 Guide for Experts can be downloaded from the Erasmus+ UK website.

9. Understand the Erasmus+ Strategic Partnerships budget

The budget for Strategic Partnerships is intended to be a contribution to the costs of delivering the project and may not cover all costs. The budget is made up of a number of different budget items, some of which are calculated on a unit cost basis and some of which are calculated on the basis of estimated actual costs. Some budget items, such as Intellectual Outputs and Multiplier Events, are only applicable for Supporting Innovation projects. Other budget items, such as Exceptional Costs and Transnational Teaching, Training and Learning Activities, may be applicable for any type of project but must be strongly justified within the application form in order to be approved.

All applicants must refer to the detailed budget guidance on pages 118 – 127 of the 2018 Programme Guide. This guidance outlines definitions of what is considered eligible for funding under each budget heading and any conditions that apply, in addition to explaining how the budget item is calculated. It is very important to ensure that the funding you request for your project is eligible and well justified within the application. Ineligible or unjustified budget items may not be approved.

Applicants should design their project budget around the activities and outputs they need to deliver in order to achieve the planned project objectives. The budget forms part of the overall project design, and the coherence and value for money of the budget will be assessed as part of the quality assessment. A good quality application should have a well-designed budget which is realistic, offers reasonable value for money, supports the project objectives, and complies with the budget rules.

Further specific guidance on specific budget items is provided within Part II of this guidance.

When will results be notified?

You should expect to hear about the outcome of your Key Action 2 Strategic Partnerships for Adult Education application within four months of the submission deadline. Please note that if your application is selected for a reserve list place you will be asked to confirm whether you wish to accept the place and the National Agency will keep you regularly updated. For the indicative notification and project lifecycle deadlines, please refer to pages 255 - 258 of the Erasmus+ Programme Guide.

If, once you have received the notification email from the UK National Agency, you believe the UK National Agency has not followed the correct procedures as set out in the relevant Commission Call for Proposals or in the National Agency's own published guidance and you wish to appeal the decision made by the UK National Agency in relation to your Erasmus+ application, you should follow the appeals procedure indicated on the Erasmus+ UK website. Alternatively, you may feel that the NA

has followed the correct procedures, but wish to make a complaint. You can download the Appeals Form or the complaints form the Erasmus+ website.

Statistics and funding results will be published in due course under the 'Key Facts and Figures' section on our website.

Where to find more help and advice

For further information, please refer to the 'Apply for Funding' section on our website.

You can have a look at previous KA2 Adult Education projects on the Erasmus+ Project Results Platform or on the 'Case Studies' page on our website.

The Erasmus+ team at Ecorys UK are available to help you with any queries you may have regarding your Adult Education Strategic Partnerships application. You can contact the team by phone on **0121 212 8947** or by email at erasmusplus@ecorys.com.

Useful tip: The Erasmus+ helpline is particularly busy before an application deadline so, while the National Agency will do their best to answer and resolve your queries, it is recommended that you start completing your application well in advance of the deadline to avoid any unforeseen issues.

If you would like to attend an application support webinar in the run up to the deadline, you will find details of the schedule and how to register on our website. Recordings of the webinars will also be made available on our website and YouTube channel in due course.

Please sign up to our newsletter to be kept up to date with the latest funding deadline reminders, news items, printed and digital resources as well as case studies and much more.

Important note: Any information, advice and guidance regarding the Erasmus+ Programme should be sought directly from the UK National Agency. The UK National Agency does not take any responsibility for incorrect information provided about the Programme by other organisations. Additionally, the UK National Agency will only communicate with the applicant organisation during the application process, and if the application is approved. Any organisations claiming to broker agreement between you and the National Agency should be avoided, as we will not liaise with any third party organisation regarding any aspect of your project.

ERASMUS+
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

Preparation Checklist

☐	Have you read the relevant sections of the 2018 Call Programme Guide?
☐	Have you checked whether this is the right Key Action and field for your project?
☐	Have you checked that your application links to current EU policies?
☐	Have you checked that your application addresses at least one horizontal and/or one field specific action priority and will impact on Adult Education?
☐	Have you checked whether your organisation is eligible for Erasmus+ funding?
☐	Have you found at least three appropriate partners from three different programme countries?
☐	Can you demonstrate the organisational and financial capacity of your organisation?
☐	Do your organisation and your partners have a PIC number?
☐	If your organisation does not have a PIC yet, have you registered on the European Commission's Participant Portal via EU Login?
☐	Have you uploaded an up to date Legal Entity Form onto the Participant Portal?
☐	Have you uploaded an up to date Financial Identification Form onto the Participant Portal, along with any required supporting documents?
☐	Are all your details on Participant Portal correct and up to date?
☐	Are your partners aware of the Participant Portal requirements?
☐	Have you checked the award criteria against which your application will be assessed?
☐	Does your organisation have a Euro account or an account that will accept Euro payments?

PART II - APPLICATION FORM

Step-by-step guide to completing your application

In order to help you put together the best possible application we have developed a step-by-step guide to assist you in filling out the electronic application form (eForm). The next pages will take you through the different sections of the eForm, emphasize the most important parts and highlight potential stumbling blocks.

It is important to be aware at application stage that if approved, you will be contractually bound by the UK National Agency to the information you have provided within your application form. **Significant changes to partners or project activities will not automatically be approved by the National Agency.** Therefore, when completing your application you must ensure that the information you are presenting (including information about partners and planned project activities) is accurate, realistic and achievable, and that all parties are aware of their responsibilities and are fully committed to the project.

Important note: Only one application can be submitted by the same consortium of partners per deadline, to one National Agency. The application must be submitted to the National Agency of the country where the applicant organisation is based.

Introduction to the eForm

It is compulsory to complete the eForm when applying for Key Action 2 Adult Education funding. The eForm can be downloaded from the 'Apply for adult education partnership funding' section on the Erasmus + UK website. Please ensure you download the correct application form.

The eForm is a PDF file which needs to be opened and edited using Adobe Reader. Adobe Reader version 9.3.3 or above (except Adobe Reader DC version 15.8) should be compatible. The recommended version is Acrobat Reader DC version **15.20**. Please download the appropriate Adobe Reader for your software via the link below:

https://get.adobe.com/uk/reader/otherversions/

Some Mac computers are not compatible with the eForm, so we would recommend that where possible you **use a PC** to complete the application.

Important note: The latest version (15.20) of Acrobat Reader DC is compatible with the eForm and so is version 15.9 and 15.7 or earlier versions. However, please note that if you have downloaded Adobe Acrobat Reader DC Version 2015.008 (15.8), the eForm will not work properly and will display the following error message: "The form cannot be opened. Please contact your National

Agency's helpdesk for further information". Therefore, please do not use version 2015.008 (15.8) of Adobe Acrobat Reader DC.

The European Commission have also advised that the following versions will result in an error to the start date of your project and therefore should not be used:

- Adobe Reader DC Version 2015.023.20053
- Adobe Reader DC Version 2015.006.30279

When completing the application if you are using one of the versions mentioned above it will not work and you will not be able to fill it in. The following message will be displayed: “The Acrobat Reader version you are using has known issues with display or calculation of the form data. Please download and install the latest version of Adobe Reader from http://get.adobe.com/reader/”.

Adobe Reader and Acrobat Reader DC are the only accepted readers. If you happen to use another reader such as "Foxit" or Adobe Acrobat X PRO you will not be able to use the electronic form and may even corrupt it and the message starting with “Unable to read form. Do not save and exit the program as it may cause data corruption or loss” will show.

When you click on the link to download the eForm from the Erasmus+ UK website, the form will automatically download to your computer. You might need to choose first whether to ‘Open’ or ‘Save’ the application form. In order to see its contents you may need to click on ‘Enable all features’ at the top right corner (depending on your version of Adobe Reader) to display the application form.

Once you have saved the eForm locally to your PC, you do not have to be connected to the internet to enter information into the form. The downloaded eForm can be saved and closed at any time without losing the entered data. **However, please note that you must be connected to the internet in order to complete certain functions such as checking your PIC code (see section 5 of this guide) and validating the form using the ‘Validate’ button at the bottom of each page. Please also be aware that some functions, such as the automatic calculations in the budget section, will not work properly unless the pages have been validated**.

You should fill in all the required fields in the form, using the mouse or tab keys to navigate. Please note that fields appearing in grey where you are unable to enter data are “Pre-filled or Calculated Fields”. You will not be able to modify these, and they will display either default values, calculation results or data already inputted in other fields or tables within the application form. If there are tables and fields in the form where multiple entries are possible or blocks/sections that can be repeated, you can add or delete rows or sections by clicking on the ‘Add’ and ‘Remove’ or the ‘+’ or ‘-’ buttons. Please note the ‘CEDEX’ field is only applicable to French organisations and can be left blank where applicable. When hovering over the text boxes the character limit for each box will appear. Please note that the maximum number of characters for the narrative boxes is 5000 characters.

It is important to remember that you will need to save your application as you go along in order to ensure that the information you have entered is retained in the form. This way, you can return to complete or amend it as many times as necessary before submitting.

Please allow plenty of time to complete the eForm, as functions such as copy and paste do not always work within the form. For further guidance on completing the eForm, please also read the European Commission's technical guidelines. This document contains more detailed information on the technical requirements needed to use the eForms and provides solutions to some common problems. The technical guidelines for the 2018 Call are available on the Erasmus+ UK website.

Important note: The numbering of the sections outlined in this guide is indicative only. The sections within the form will change depending on the type of project and the options and activities selected. The guidance covers all possible sections of the application form, however not all sections will be applicable to all projects. You should ensure that the activities selected are relevant to the type of project you plan to deliver and to its objectives, and make sure that all relevant sections of the eForm are completed in sufficient detail.

A. General Information

This section consists of an overview of the application form.

B. Context

This section consists of a data table containing information specific to the application being made. Data fields including Programme, Key Action, Action, Which field is most impacted, Call, Round and Deadline for Submission have already been pre-filled.

You should check that the pre-filled fields: Key Action, Action and Field correspond to the funding being applied for:

Key Action: Cooperation and Innovation and the Exchange of Good Practices

Action: Strategic Partnerships

Which field is most impacted: Strategic Partnerships in Adult Education

Call: 2018

Round: Round 1

Deadline for submission: 21/03/2018

If any of the above fields do not apply to the grant you wish to apply for, then you are using the wrong eForm – please visit the 'Apply for adult education partnership funding' page to download the correct eForm or the general 'Apply for Funding' page to search for the appropriate funding opportunity and application form.

Main objective of the project: Please select from the dropdown menu whether you are applying for a 'Innovation' project or an 'Exchange of Good Practices' project.

Important note: The project type you select will dictate which fields are available within the application form, including the activities and budget sections. Please ensure you select the correct option from the outset, as if you try to change this once you have started to complete the form you may lose your work. Please refer to page 106 of the Erasmus+ Programme Guide for information about the two types of Strategic Partnership project. It is important to choose the most appropriate project type, bearing in mind the experience and capacity of your partnership and the objectives of your project.

Language used to fill in the form: Select English from the drop-down menu for applications made to the UK National Agency.

B.1. Project Identification

The only pre-filled information in this section will be the project end date, the applicant organisation name and the form hash code. You will need to complete all other sections.

Project Title: Please choose a title for the project, which is different from your organisation name. Please be aware that this will be the title your project will be known by for the duration of the project if your application is approved; therefore, please ensure it is relevant and appropriate.

Project Acronym: If applicable, enter any acronym for your project title here. This field is not compulsory.

Project Start Date: Select a date from the calendar. This should be the earliest date from which you will need to spend the grant and before your activity starts. For KA2 Adult Education projects this must be between 1 September 2018 and 31 December 2018.

Project Total Duration: A Strategic Partnership in the Adult Education field can last between 12 and 36 months. Select the number of months from the drop-down menu. You must choose the duration of the project to cover all project activities, from initial planning and promotion through to evaluation and dissemination. It is important to ensure the project duration is realistic in order for you to complete all project's planned activities and outputs to a high standard. You should have activities planned throughout the project duration.

Please note that the indicative date for signing a grant agreement is 5 months after the deadline. It is recommended that you plan in enough time before your activities to be sure to be able to get value for money on travel costs, venue hire etc.

Project End Date: The latest possible end date for activity is **31 August 2021**. Therefore, depending on your start date, you may not be able to apply for the full 36 months duration. The end date will populate automatically depending on the start date and the duration of the project.

Applicant Organisation Full Legal Name (Latin characters): This field will populate based on your PIC (see section D.1).

Useful tip: It is recommended to select dates using the drop-down calendar. If you decide to enter the date manually, please ensure it is in the correct format (dd-mm-yyyy) otherwise the form may not validate.

B.2. National Agency of the Applicant Organisation

Identification: Select **UK01** United Kingdom from the drop down box.

C. Priorities

Please select the most relevant horizontal or sectoral priority according to the objectives of your project. Please select at least one priority using the drop-down menu. This can be an Adult Education specific priority or a horizontal priority. In case of a horizontal priority, you will still need to demonstrate how your application directly relates to and intends to impact the Adult Education field. The priority you select should clearly reflect the objectives of your project.

Additional priorities can be added or any added in error can be removed, using the '+' or '–' 'symbols, however please note that you will be only able to remove the latest added priority. The maximum number of priorities you can select is three.

Please comment on your choice of priorities: Please provide a clear and detailed explanation for why you have selected the chosen priorities from the drop down menu. This is an important section and you should clearly explain the link between the selected priorities and the objectives of your project, making it clear how the proposed project will impact on the Adult Education field. You should comment on each of the priorities selected.

D. Participating Organisation(s)

D.1. Applicant Organisation

This section asks applicants to provide information relating to the applicant organisation.

Before completing this section of the form you must register your organisation on the European Commission's Participant Portal to obtain a PIC number. Please refer to section 5 of this guide for further information. If you have already submitted an Erasmus+ application previously and already have a PIC, you do not need to re-register and should use the same PIC for any further Erasmus+ applications.

Once you have entered your correct PIC in the box and selected 'Check PIC', the address fields should populate automatically.

If there are any changes to the information originally provided, you will need to log back onto the Participant Portal and update the information accordingly. If you are not able to make the amendments before the application deadline, or if the details are different from those that appear automatically, do not worry – contact details specific to the project can be entered in the sections below.

If you receive an error when clicking 'Check PIC', please check that you are entering the right code and that you are connected to the internet. If you are still receiving an error code please contact us at erasmusplus@ecorys.com.

D.1.1. Profile

Type of organisation: Please select the most relevant organisation type from the drop-down menu. If you cannot find any suitable option in the list, select the option 'Other'.

The remaining parts of this section of the form will be pre-filled using the information submitted on the European Commission's Participant Portal. Please check that this information is accurate and update the Participant Portal if necessary.

If you experience problems at this stage and the fields are not populating correctly, we recommend that you check your organisation's registration in the Participant Portal. Please have a look at the Participant Portal User Manual for advice on how to update these details.

D.1.2. Background and Experience

The information in this section will inform the assessment of your organisation's capacity to manage the project and the requested grant successfully.

Please briefly present your organisation. Please include the aims of your organisation, its location, and size, and the type of work normally delivered. Explain how the activities proposed in this application are relevant to the other programmes or activities you deliver. Please also provide details of the approximate numbers of staff, volunteers and learners, as appropriate.

What are the activities and experience of your organisation in the areas relevant for this project? What are the skills and /or expertise of key persons involved in this project? Please explain how your organisation's previous experience of delivering projects, activities or other work

has developed the skills and knowledge needed to deliver the activities you propose in this application. Mention whether you have previously worked on Erasmus+ funded projects or projects funded by other EU programmes and/or whether you have prior experience of working transnationally and/or managing cooperation projects.

Please also give details of key members of your organisation who will be involved in the delivery of the proposed project, describing their roles and outlining their skills, relevant experience and/or qualifications.

Have you participated in a European Union granted project in the 3 years preceding this application? Please select from the drop down menu. If you select 'yes', complete the table with all the relevant information. To add more rows, click on the '+' icon. To delete activities, click on the '-' icon. In the event that your organisation has been involved in numerous previous projects, please select the ones most relevant to your current application, e.g. projects funded under the previous Lifelong Learning Programme or current Erasmus+ programme. If you have been involved in previous projects under these programmes but do not know the exact details, please contact the UK National Agency to check.

D.1.3. Legal Representative

Enter the details of the person who is authorised to enter into a legally binding contract on behalf of your organisation. This may be your Finance Manager or another member of the Senior Management Team. If your application is approved, this person will also need to be the signatory for the Grant Agreement and the person who takes responsibility for the terms and conditions attached to the grant on behalf of your organisation.

Please complete all fields in this section.

In order to facilitate contact between the applicant and the UK National Agency, we strongly recommend that the person acting as the legal representative is different from the main contact person for the applicant organisation.

If the address of the legal signatory is different from the organisation address, you should ensure there is a check in the box next to 'if the address is different from the one of the organisation, please tick this box' and then provide additional address details.

Important note: Please ensure the legal representative details are consistent throughout the application form, in the Declaration of Honour and partner mandate (if applicable). If there are inconsistencies, your application may not be taken forward. Please notify the UK National Agency as soon as possible of any changes.

We strongly recommend that the legal representative and appropriate officers within your organisation review the Declaration of Honour together with the 2018 Programme Guide, Part C, Step 2: Check

the Compliance with the Programme Criteria on page 245. Please ensure you give special attention to the Exclusion Criteria.

D.1.4. Contact Person

Complete as per Legal Representative. We will use these details as the first point of contact for the application and, should it be successful, the grant. We strongly recommend that the contact person for the application is different from the legal representative.

If the address of the contact person is different from the organisation address, you should ensure there is a check in the box next to 'if the address is different from the one of the organisation, please tick this box' and then provide additional address details.

You can select up to three contact persons. If you plan to include more than one contact person, we recommend that you list the primary contact person first in the application.

Please ensure that all the details provided are up to date and that those people will be available throughout the application process as well as the project lifetime. Please contact us as soon as possible if there are any changes.

D.2. Partner Organisation

Strategic Partnerships in the Adult Education field must have a minimum of three partners from three different Programme Countries in order to be eligible for funding.

Partner organisations from any Partner Country in the world can participate in Strategic Partnerships **only** if their participation will bring an essential added value to the project. Please see pages 22 - 23 and 111 of the Programme Guide for further details about Partner Countries and the conditions of their participation. If you plan to include a partner from a Partner Country, you must ensure that the essential added value is clearly explained within the application, as if the added value is not clearly justified, the project will not be considered for selection. See page 116 of the Programme Guide for further information on how applications involving partners from Partner Countries will be assessed.

Please repeat the same steps as for the Applicant Organisation when adding information about partner organisations. All partner organisations will need to have a registered PIC and we would recommend that your partners test their PICs well in advance to ensure that the information is correct and that there is time to resolve any PIC issues. You must ensure you are connected to the internet before entering the PIC and clicking the 'Check PIC' button. The partner organisation's information will then automatically populate in the form.

If you do not add a partner organisation as you complete the application, you will not be able to add them at a later date. You can add more partners by clicking the 'Add Partner' button. Any organisation you intend to include as a formal, funded partner (rather than an associated partner) must be listed as a partner, by their PIC, in section D.

Important Note: You must annex a signed partner mandate for each member of the partnership to the application form. The European Commission has provided a partner mandate template which must be used and which is mandatory for applicants to complete and can be downloaded here. Please ensure that each mandate is signed and dated **in original** by the organisations' legal representative. Electronic signatures will not be accepted. Please note that the organisation details provided on partner mandates **must** match the partners details specified on the Participant Portal and/or application form.

D.2.1. Profile

Type of organisation: Please select the most relevant type from the drop-down menu.

The remaining part of this section of the form will be pre-filled using the partner information submitted on the European Commission's Participant Portal. Please check that this information is accurate and ask the relevant partner(s) to update the Participant Portal if necessary.

If you experience problems at this stage and the fields are not populating correctly, we recommend that you check with your partner their organisation's registration in the Participant Portal. Please have a look at the Participant Portal User Manual for advice on how to update these details.

D.2.2. Background and Experience

This section of the application is broken down into three sub-questions and asks for further information regarding the activities and experience of partner organisations in the areas relevant to the application. Additionally you must outline the relevant skills and expertise of key people at the partner organisations.

The description of your partner's profile, background and experience should make it clear why this partner has been chosen to participate and what skills and experience the partner has which are relevant to the current project application. If the partner is from another field of education, training or youth, you should explain how their participation is relevant to, and will add value to the current application submitted under the field of Adult Education. If you are including a partner from a Partner Country, you must make it clear how their participation will bring essential added value to the project.

You are also required to indicate whether partner organisations have participated in a European Union funded project in the three years preceding this application by selecting 'Yes' or 'No' from the drop down menu. If yes, you must provide further details. Please follow the advice provided in section D.1.2. above.

D.2.3. Legal Representative

Details of the partner's legal representative should be provided in this section. If the address of the legal signatory is different to the organisation's address, please check the box next to the statement 'if the address is different from the one of the organisation, please tick this box', and provide additional address details.

D.2.4. Contact Person

Details of the partner's contact person should be provided in this section. If the address of the contact person is different from the organisation address, please check the box next to the statement 'if the address is different from the one of the organisation, please tick this box', and provide additional address details.

Add / Remove Partner Buttons

Additional partners can be added by clicking on the 'Add Partner' button. If a partner has been entered in error you can delete their information using the 'Remove Partner' button.

Useful tip: Please note that this method will only delete the most recently entered partner, so to avoid re-entering information you should ensure that your partnership is finalised before completing the application form.

D.4 Associated Partners

Please note: This section will only appear if you have selected 'Innovation' in section B context. If you selected 'Exchange of Good Practice' as the project type, you will still need to provide the information outlined below regarding the involvement of any associated partners, however you will need to include it in the 'Description of the Project' section below.

In addition to the organisations formally participating in the project and receiving EU funds, Strategic Partnerships may also benefit from the involvement of other organisations from the public or private sector that can bring added value to the planned activities by investing their own resources and expertise. Any such organisations will be considered **associated partners** and from a contractual perspective, they are not formal project partners and will not receive any Erasmus+ grant funding. It is **not compulsory** to include associated partners in your project and they should only be included if they will add value.

If you plan to involve any associated partners in your project, you must clearly explain the scope of their involvement in the project activities, the added value they will bring, and outline how their participation will be funded. The application should make it clear how any associated partners will

support the delivery and/or dissemination or sustainability of the project. An explanation should be included for each associated partner mentioned.

E. Description of the Project

Important note: All questions should be answered in full, including as much relevant detail as possible. The character limit for each of the individual text boxes is up to 5000 characters. It is recommended that you refer to the detailed award criteria for Strategic Partnerships outlined in the 2018 Guide for Experts as you complete the application.

Please explain the context and the objectives of your project as well as the needs and target groups to be addressed? Why should this project be carried out transnationally? What is the situation or need which has led to the development of this project? What problems or gaps will the partners work together to address? What needs will the project address for the organisations involved, the wider community and/or the EU? How will the project contribute to overarching EU education policy objectives and the Action priorities you have selected? When referencing previous needs analyses, please summarise the findings within the application and include a website link or annex, where possible. Wherever possible, provide evidence to back up statements referring to the need for the project. Explain why the project needs to be delivered at a European level rather than with national partners, and how this will add value.

Please note that the principle of proportionality will be applied in the assessment of each application. Information provided should be proportionate and relevant to the objectives of the project. For example, it is expected that a smaller scale project is less likely to refer directly to the EU modernisation agenda.

What results are expected during the project and on its completion? Here you need to provide a detailed description of the expected results of the project, particularly those not described separately in the sections of the application relating to Intellectual Outputs, Multiplier Events or Learning, Training and Teaching Activities. The results are the outputs and outcomes of your proposed project, realised during the life of the project and upon its completion. For example, what changes or outcomes do you hope to achieve for the individuals or organisations involved? A result/output can be a tangible product (e.g. changes to Adult Education curricula for enhancing basic skills, changes to Adult Education policy, an approach or model to solve a problem, a handbook, e-learning tool, research report, newsletters) or an intangible outcome (e.g. knowledge and experience gained by learners and staff, improved cultural awareness). Please note that this section may overlap with later sections, so if your project is a 'Development of Innovation' project carefully consider whether your results are 'Intellectual Outputs', Multiplier Events, or Teaching, Training and Learning activities, in which case the detail descriptions might fit better in these sections.

In what way is the project innovative and/or complementary to other projects already carried out? How does this project relate to other projects? What other projects are working to address the situation described above, or how have the partners already worked on the issue? How will this project add to or build on what has already been achieved, and how is it different? What new approach, tools or methodologies will it introduce? How will it change practice in the organisations involved or more widely? It should be clearly explained how the approach/method the project focuses on is innovative or complementary to other similar projects. For example, it is not sufficient to state that a project will involve a different target group or country, but you should describe how the methods you will develop are innovative for the proposed target group(s) and the countries involved.

How did you choose the project partners and what experiences and competences will they bring to the project? How was the partnership established and does it involve organisations that have never previously been involved in a similar project? In the relevant boxes in the application form, explain why you chose your partners and how they will contribute to the successful delivery of the project. For example, what skills, competencies and experience do the partners have? Explain the expertise of all partners and what they will bring to the project, including smaller or less experienced partners. Describe what relevant, complementary experience and expertise the partners will bring to ensure the project is delivered effectively. Are any partners new to this type of project, and if so what will they bring to the project and how will they benefit from it? How will any new or less experienced partners be supported to participate? Partners can have common interests/expertise, but where possible, it is recommended to include partners with complementary expertise to ensure all partners can contribute.

If your partnership will include partners from other sectors of education, training or youth, explain the rationale for including them in the project, as opposed to having a partnership made up solely of Adult Education organisations. Make it clear how their inclusion will benefit the project.

If your project includes organisations from Partner Countries, the essential added value they will bring to the project (e.g. by introducing new practices or specific expertise) must be clearly justified, otherwise the application will not be considered for funding.

If you plan to involve any associated partners in your project (it is not compulsory to do so), ensure that you clearly describe the scope and value of their involvement and how it will be funded. An explanation should be provided for each associated partner listed. This is particularly important in the case of Exchange of Good Practices projects, where there is no separate box within section D to include this information.

How will the tasks and responsibilities be distributed among the partners? There should be a clear plan for allocating tasks and responsibilities amongst the partnership. Explain the rationale for allocating certain tasks to certain partners, both in terms of their experience or expertise and in terms of the benefit they may gain from the experience. Ensure there is a balanced and well-reasoned distribution of tasks, and that all partners participate actively.

What are the most relevant topics addressed by your project? Taking into consideration your project's objectives, choose the most relevant topic areas for your project from the drop down list. You can choose up to three topics from the list. Use the '+' and '-' buttons to add or remove entries.

E.1. Participants

Please briefly describe how you will select and involve participants in the different activities of your project? Name the specific activities, who will be involved, the process and the rationale for selecting participants. Consider the main target groups you hope to impact with the project and how they will be involved to achieve maximum impact. Clearly describe how you will ensure that the planned numbers of participants can be recruited for the various activities.

Participants with fewer opportunities: does your project involve participants facing situations that make their participation in the activities more difficult? Please select 'yes' or 'no' from the drop down menu. If you select 'yes', the following three questions will appear:

How many participants (out of the total number) would fall into this category? Please give the actual or likely number.

Useful tip: A person with fewer opportunities is defined as a person facing obstacles which prevent them from having effective access to education, training and youth work opportunities.

Which types of situations are these participants facing? Please select from the drop down menu the profile of the participants with fewer opportunities this project will involve. For more detail on each of the categories, please refer to page 10 of the Erasmus+ Programme Guide, in the section on Equity and Inclusion.

How will you support these participants so that they will fully engage in the planned activities? Please describe the specific measures you will implement to ensure that these participants are appropriately supported and able to participate fully and safely in the project..

Reaching disadvantaged groups is a key focus of Erasmus+. Within the context of Erasmus+, people with fewer opportunities are those facing a disadvantage because of personal difficulties or obstacles that limit or prevent them from taking part in transnational projects.

If your project doesn't involve any participants with fewer opportunities, you will only have to answer the question below focusing on the other participants involved in your project.

Describe briefly how and in which activities these persons will be involved? Indicate how your participants will be involved in the project in order to achieve your objectives and deliver the maximum impact. Make sure that you clearly explain which activities the different types of participants (e.g. staff, learners) will be involved in, what they will be doing, and how their involvement supports the project objectives and planned impacts.

F. Preparation

Please describe what will be done in preparation by your organisation and by your partners before the actual project activities take place, e.g. administrative arrangements, communication etc. Describe the preparatory work to be undertaken before and around the planned project activities. This could include, for example: how partners will communicate and cooperate in order to arrange and deliver the project activities; how partners will develop detailed plans and monitor progress to ensure the project delivers its objectives and activities on time and to a good standard; how the project budget will be effectively managed and allocated; how participants will be recruited, selected, prepared for and supported during transnational activities; and how key stakeholders will be engaged and informed about the project.

You should clearly describe how you will agree the programme of activities and working methods with your partners; for example, the process for agreeing roles and responsibilities with partners in order to ensure quality outcomes, as well as good administration and delivery of the project.

G. Project Management and Implentation

This section requests details of the planned methodology for delivery of the project. Within this section you are asked to give details about plans for project management and the implementation of the project, as well as specific activities and outputs. It is recommended that you include as much relevant detail as possible, and you should carefully consider the award criteria outlined in the Programme Guide, pgs. 115-116 and ensure that all aspects are addressed within your application. The character limit for each text box is up to 5000 characters.

Please provide detailed information about the project activities that you will carry out with the support of the grant requested under the item 'Project Management and Implementation'. Describe the activities to be funded using this component of the grant, for example project management and cooperation activities, financial monitoring, small scale or local activities. This section is important for all projects, but particularly important for 'Exchange of Good Practices' projects where all project activities with the exception of any training, teaching or learning activities will need to be described here. Please be as clear and specific as possible, and demonstrate the link between the proposed activities and the objectives of your project. Explain how the planned activities will be organised and who will manage and lead them.

Please note: You must complete the Project Timetable Spreadsheet template available from the Erasmus + UK website and upload it as an annex (see Section N. below).

Important note: The activities of a Strategic Partnership must take place in the countries of the organisations participating in the project. Activities can also take place at the seat of an Institution of the European Union (Brussels, Frankfurt, Luxembourg, Strasbourg and The Hague) even if in

the project there are no participating organisations from the country that hosts the Institution. The rationale and benefits of holding activities in a seat of the European Union should be explained.

Where relevant, Multiplier Events can take place in the country of an associated partner involved in the project, where this is fully justified in relation to the objectives of the project.

Please describe the methodology you intend to apply in your project. Clearly describe how you will manage and deliver your project. The proposed project methodology should be clear, realistic and well suited to your partnership, project objectives and outputs. It is important to give careful consideration to how you will develop and manage your project work plan, and how progress and quality will be monitored, and impacts measured. You will be able to expand on some of these aspects in subsequent sections but it is important to ensure that all the relevant information is presented logically within the application.

Describe the tools and methods you will use to monitor progress and expenditure within your project. For example, how, when and on what basis do you plan to transfer project funds to your partners? How will you agree how the funds will be allocated between partners? How will you ensure value for money in the project delivery? How will you respond to any identified budget under or overspend, or delays to your project?

Describe how you will evaluate progress against key milestones in the project work plan over the course of the project. Who will be responsible for project monitoring and how will this be done? How often will project monitoring take place? What will the indicators of achievement (qualitative and quantitative) be? How will you ensure that the project remains on track, achieves its objectives, is delivered to the expected quality and realises its intended impacts?

Transnational project meetings: how often do you plan to meet, who will participate in those meetings, where will it take place and what will be the goal? Provide clear information on how many transnational project meetings will take place during the project, the timing of these and the aspects to be discussed. Explain where the meetings will take place and who will host them. Please ensure that the information in this section corresponds with the relevant budget section and that you include these meetings on your Project Timetable Spreadsheet. Please note that transnational project meetings can only take place in one of the countries of the funded partner organisations, or in the country of a seat of an institution of the European Union, where this is justified.

How will you communicate and cooperate with your partners? Strategic Partnerships are cooperation projects delivered jointly by the partners and therefore clear communication, roles and responsibilities are essential to ensure quality and efficient cooperation. Please describe how all partners will communicate (i.e. what methods, how often), how you will work together to deliver the different activities of the project, and how you will report on progress at key milestones. Please also explain how alternative communication methods will be used in between transnational meetings. You should demonstrate that the plans for communication and cooperation are suited to the needs of the

project and the partnership. Where relevant, you should also describe how you will communicate and work with key stakeholders in your project.

The following three questions will only appear if the main objective of the project is 'Innovation':

- **How will you ensure proper budget control and time management in your project?** Describe which methods you will use in order to ensure that project is managed in a timely manner and as set out within the original timetable. Describe your financial monitoring systems and how information will be collected from partners to support project monitoring. How will expenditure on the project, in line with the budget rules for Strategic Partnerships, be monitored and recorded? How, when and on what basis do you plan to transfer project funds to your partners? How will you agree how the funds will be allocated between partners? How will you ensure value for money in the project delivery? How will you respond to any identified budget under or overspend, or delays to your project?

- **How will the progress, quality and achievement of project activities be monitored? Please describe the qualitative and quantitative indicators you will use. Please give information about the involved staff, as well as the timing and frequency of the monitoring activities:** Describe the tools and methods you will use to monitor the progress and quality of your project.

- **How will you evaluate the extent to which the project reached its results and objectives? What indicators will you use to measure the quality of the project's results?** Describe how you will evaluate whether, and to what extent, your project has achieved its objectives and results? When will evaluation take place? Will it be internal or external to the partnership and what is the reason for your choice? What tools, methods and indicators will be used?

  Indicators of achievement could include (for illustrative purposes only):

  - measures of skills level attained, to establish new methods' impact on participants;
  - measures of beliefs, attitudes or support, as an indicator or attitudinal or behavioural change;
  - measures of quality of the products/tools you have produced;
  - measures of the use and dissemination of your project results.

  Evaluation methods might include surveys, interviews, focus groups, research or web analytics. The data you collect may be from participants, key stakeholders or other community representatives.

  You may find it useful to refer to the resources on impact assessment available on the Erasmus+ website.

What are your plans for handling project risks e.g. delays, budget issues, conflict resolution)? Outline of the main potential risks you might encounter during your project, based on the proposed activities, participants and context or project environment. Identify, for example, relevant national legislation that you will need to comply with (i.e. UK legislation on child protection or health and safety), then present your risk management plan, i.e. an outline of how you will manage these specified risks and identify any individuals with responsibility for risk management. Describe how you will regularly monitor risk and check that your controls or steps to mitigate or reduce risk are working.

The following two questions will only appear if the main objective of the project is Exchange of Good Practices:

- **How will the monitoring of the project activities be carried out and by whom?** Describe which methods will be used to monitoring your project's activities and how regularly activities will be monitored. Who will be responsible for project monitoring? How will you ensure that the project remains on track, achieves its objectives, and realises its intended impacts?

- **How will you assess the success of your project?** What tools, methods or approaches will you use to evaluate whether and to what extent your project has achieved its planned objectives, outcomes and impacts? When will evaluation activities take place? Who will be involved in the project evaluation? What measures of achievement will be used?

If relevant for your project, do you plan to use Erasmus+ online platforms (e.g. EPALE, School Education Gateway, eTwinning) for the preparation, implementation and/or follow-up of your project? If relevant, please indicate which Erasmus+ online platforms you intend to use and how these will be used to support the preparation, delivery and/or dissemination of your project. Consider carefully how platforms such as EPALE can support your project in delivering its planned outcomes and impacts. In answering this question, remember to explain **how** online platforms will be used in your project. Please note that for all KA2 projects it is also compulsory to upload final project results onto the Erasmus+ project results platform: http://ec.europa.eu/programmes/erasmus-plus/projects/

G.1. Intellectual Outputs *(**only** applicable for an 'Innovation' project)*

It is only possible to apply for specific funding for Intellectual Outputs if you have selected 'Innovation' as the main objective of your project.

Intellectual Outputs are tangible outputs, which must **be substantial in quality and quantity, with potential for wider use**, **exploitation and impact.** Examples of Intellectual Outputs could include curricula, pedagogical materials, open education resources, IT tools, analyses, studies or peer-learning methods (this is not an exhaustive list). Internal documents and project management tools such as dissemination plans, project-specific needs analyses or project evaluation reports will not normally be considered eligible as Intellectual Outputs, as they do not meet the requirement to have potential for wider use, dissemination and impact.

Although recommended, Intellectual Outputs are not compulsory for Strategic Partnership projects and this section should only be included if the planned outputs meet the definition of Intellectual Outputs outlined in the Erasmus+ Programme Guide, page 121. If the Intellectual Outputs do not clearly meet this definition, the requested funding may not be approved.

Important note: If you are not planning to deliver Intellectual Outputs as part of your project you should consider whether it would be more appropriate to apply for an 'Exchange of Practice' project instead of 'Innovation'. In all cases the planned outcomes of your Strategic Partnership project should be realistic and achievable within the project's lifetime, bearing in mind the size and capacity of the partnership and with the budget available.

It is very important to ensure that any Intellectual Outputs you request funding for are eligible. If they do not meet the definition of an eligible Intellectual Output outlined in the Programme Guide, the funding for these activities may be removed and this could also affect the quality assessment of your project.

If your project intends to develop Intellectual Outputs, select 'yes' from the dropdown menu for the table to appear. Please complete the table as indicated below:

- **Output Identification** – this will be pre-filled.
- **Output Title** – Give each Intellectual Output a clear, relevant title.
- **Output Description** – Provide a **detailed** description of the planned output here, making sure that it is clear how the output meets the definition of an eligible Intellectual Output. You should describe one output per table. Within the description you should also explain the elements of innovation, the expected impacts and the potential for transferability. You can include up to 5000 characters in this box.
- **Output Type** – Choose the type of output which most closely describes the output you plan to develop from the drop down menu.
- **Division of work and methodology** - Provide a clear and **detailed** description of the methodology for developing the Intellectual Output, including details of all the phases of development for which you are requesting funding. Within this box you should also outline the division of work and the roles and responsibilities of the respective partners. You can include up to 5000 characters for this section.
- **Start date** - Choose a date from calendar to ensure the correct date format. This should be the date work begins on the development of the Intellectual Output.
- **End Date** - Choose a date from calendar to ensure the correct date format. This should be the date work ends on the development of the Intellectual Output.

- **Languages** – This refers to the languages the Intellectual Output will be available in. Add languages by clicking the '+' button and selecting the language from the drop down. You can add as many languages as you plan to translate the output into, ensuring this is achievable.
- **Media –** This relates to the media the Intellectual Output will be available in. Add languages by clicking the '+' button and selecting the language from the drop down.
- **Activity Leading Organisation** – Select the partner organisation who will lead on the development of the Intellectual Output from the drop down menu.
- **Participating Organisations** – Add all the partners who will participate in the development of the Intellectual Output, using the '+' button and the drop down menu.

You can add or remove entries using the '+' and '-' buttons, however please note that this will only delete the most recently entered output, so to avoid re-entering information you should try to ensure that your plans for the outputs are finalised before completing the application form.

G.2. Multiplier Events *(**only** applicable for an 'Innovation' project)*

Multiplier Events funding is only available for 'Innovation' projects, which plan to deliver Intellectual Outputs. You will only be able to request funding for Multiplier Events as part of your project if you have included Intellectual Outputs in the section above.

Important note: Multiplier Events must be conferences, seminars or events directly linked to sharing and disseminating the Intellectual Output(s) they relate to. Consequently, they should normally be planned to take place at a stage when the related Intellectual Output has been substantially been developed, in order to maximise the dissemination potential. There is an emphasis on visibility and dissemination of results in Erasmus+, so Multiplier Events reaching beyond the immediate project partners and beneficiaries are recommended. Multiplier Events are expected to be physical events and each Multiplier Event is expected to be a single event.

It is important to ensure that any events listed as Multiplier Events meet the definition and will be eligible. For further information about the eligibility requirements for Multiplier Events funding, refer to page 122 of the Erasmus+ Programme Guide. If Multiplier Events are not considered eligible, the requested funding may not be approved.

Select your answer from the drop-down menu. If you select 'yes' a new section on Multiplier Events will appear.

In this section you should list any national or transnational conferences, seminars and events aimed primarily at sharing and disseminating the Intellectual Outputs realised by the project. Please complete as indicated below:

- **Event identification** – this will be pre-filled.

- **Event title -** Give each Multiplier Event a relevant title.
- **Country of Venue** – Select the venue of the event from the drop down menu. You must ensure the venue you choose is an **eligible location**, as outlined in the Programme Guide on page 113. Multiplier Events can take place in the countries where the partners participating in the project are based, or **where justified** in the country of the seat of an Institution of the European Union, or the country of an associated partner mentioned in the application.
- **Event description** - Please provide a clear and **detailed** description of the Multiplier Event, ensuring it meets the eligibility requirements, and providing justification if it is not clear why the event should receive Multiplier Events funding. You should describe who the target audience will be, how you will ensure that required numbers of eligible participants attend, and why you have chosen the location. You can include up to 5000 characters for this section.
- **Start Date** - Choose a date from calendar to ensure the correct date format.
- **End Date -** Choose a date from calendar to ensure the correct date format.
- **Intellectual Outputs covered -** Use the '+' button and the drop down menu to select the Intellectual Output(s) which will be disseminated at the Multiplier Event.
- **Activity Leading Organisation** – Select the partner organisation responsible for leading on the preparations for the Multiplier Event from the drop down menu. This must be one of the funded partners.
- **Participating Organisations –** Use the '+' button to add all the partner organisations who will participate in the Multiplier Event.

You can add or remove entries using the '+' and '-' buttons, however please note that this will only delete the most recently entered output, so to avoid re-entering information you should try to ensure that your plans for the outputs are finalised before completing the application form.

G.3. Learning/Teaching/Training Activities

Learning, Teaching and Training activities can be included in any Strategic Partnerships project (either 'Innovation' or 'Exchange of Good Practices') provided they are embedded within the project and will bring added value in terms of supporting the achievement of the project's objectives. You must make it clear within the application how these activities will contribute to achieving the wider project objectives.

Select your answer from the drop-down menu. If you select 'yes' a new section on Learning, Teaching and Training activities will appear.

Important note: Eligible Teaching, Training and Learning activities for Strategic Partnerships in the field of Adult Education are:

- Blended Mobility of Adult Learners
- Long-term Teaching and Training Assignments
- Short-term Joint Staff Training Events.

You must make sure that there is consistency between the description of the activities in this section and the corresponding budget in section I.5.

What is the added value of the learning, teaching or training activities (including long-term activities) with regards to the achievement of the project objectives? Clearly describe how any planned Teaching, Training and Learning activities will contribute to achieving the project's overall objectives. The planned activities must clearly add value to the project and complement other project activities; they should not just be 'bolt on' mobility activities.

Important note: It is important to ensure that the participants you plan to involve in and Teaching, Training and Learning activities are eligible. Please refer to the additional eligibility criteria on page 114 of the Programme Guide:

- **Blended Mobility of Adult Learners:** Eligible participants are learners from the participating (i.e. partner) organisations, based in Programme Countries.
- **Long-term Teaching and Training Assignments:** Professors, teachers, trainers, educational and administrative staff working in the participating (i.e. partner) organisations, based in Programme Countries.
- **Short-term Joint Staff Training Events:** Professors, teachers, trainers, educational and administrative staff working in participating (i.e. partner) organisations, based in Programme or Partner Countries.

All participants must be from the partner organisations participating in the project.

Blended mobility of learners and long-term teaching, and training assignments of staff to or from Partner countries are **not eligible**.

Complete one table within the application form for each Teaching, Training and Learning activity planned:

- **Activity number** – This will be pre-filled.
- **Fields –** Select the relevant field, in this case Adult Education, from the drop down menu.
- **Activity type** – Select the type of activity from the drop down menu.
- **Activity description –** Include a clear and **detailed** description of the planned activity here, including the profile of the participants to be involved, the content of the proposed training and

who will be delivering it. Please ensure that the proposed participants are eligible – see above. You can write up to 5000 characters in this section.

- **Country of venue –** Choose the country the activity will take place in from the drop down menu. Ensure this is an **eligible location**. Teaching, Training and Learning Activities can take place in the countries of the partners participating in the project or, **where justified**, in the country of a seat of an EU Institution. Blended Mobility of Learners and Long-term Teaching and Training Assignments **cannot** take place in a Partner Country.

- **Number of participants** - If you are applying for an 'Exchange of Good Practices' project, please be aware that the total number of participants you can include, including any accompanying persons, is limited to 100.

- **Participants with special needs (out of total number of Participants)** - Even if you are not sure of the details, include any anticipated participation by people with special needs here.

- **Accompanying persons (out of total number of Participants) –** As above. The numbers identified under 'Participants with special needs' and accompanying persons must be within the total number of participants identified for the activity.

  The intended function of an Accompanying Person is to ensure the safety, protection and support of participants during their mobility activity, rather than to undertake project related work or training. A full definition of an Accompanying Person can be found in the Programme Guide, page 313.

- **Duration in days/months -** Ensure the chosen duration is eligible. Refer to the minimum eligible duration for each activity type on page 114 of the Programme Guide (see below). Depending upon whether the activity is long or short term, you need to enter the activity duration in months or in days respectively. Long-term activities are measured in months (one month = 30 days); short-term activities are measured in days. A long-term activity is classed as two months (60 days) or over. The duration of blended mobilities and short-term staff training activities should exclude travel days. Please be aware that, as long-term activities have durations based on months rather than days, it is not possible to request additional travel days for these activities within the application form.

- **Participating organisations –** Use the '+' button and the drop down menu to add the partner organisations whose participants will take part in the activity.

Important note: It is important to ensure the chosen duration of your activity is **eligible.** Refer to page 114 of the Programme Guide:

- **Blended Mobility of Adult Learners:** 5 days to 2 months, excluding travel days.
- **Long-term Teaching and Training Assignments:** 2 to 12 months.

- **Short-term Joint Staff Training Events:** 3 days to 2 months, excluding travel days.

You should plan for your actual learning, teaching and training activity to last for at least minimum duration.

If needed, you can add more activities by clicking the 'Add Activity' box.

How will you select, prepare and support participants and ensure their safety? Please describe the practical arrangements including training, teaching or learning agreements, if applicable. Clearly outline the plans and processes for selecting, preparing and supporting participants before, during and after their activity abroad. Provide details of the administrative arrangements, specific preparation activities to be delivered, including linguistic support where relevant. Outline how the practical arrangements such as travel, accommodation, visas, and orientation will be organised and who will be responsible. Describe how relevant participants will be identified and selected. It is particularly important to outline how participants will be monitored and supported during their activity abroad and how their safety will be guaranteed.

We recommend that you plan to comply with UK legislation and consider relevant national legislation in the country of each partner. In the UK, this includes the UK Data Protection Act, and legislation/statutory guidance relevant at any time to the safeguarding and protection of vulnerable adults (for example Safeguarding Vulnerable Groups Act 2006).

You must consider the Foreign & Commonwealth Office's travel advice for the countries to which you will travel to or send participants. We will ask you to observe their guidance: https://www.gov.uk/foreign-travel-advice and may not fund transnational mobility in cases where the FCO advises against it.

Describe the arrangements for recognition or validation of the learning outcomes – use of national/European instruments. Describe how you will ensure the recognition and/or validation of the learning outcomes of participants in Teaching, Training and Learning activities. In particular, describe how your project will make use of national or European instruments/certificates. For example, learning outcomes can be validated through EU validation tools such Europass.

For further details please visit Europass: http://europass.cedefop.europa.eu/en/home.

H. Follow-up

H.1. Impact

Impact is the effect or benefits brought about by an activity and/or its results, including changes for individuals, organisations, systems, practices or policy, at all levels of society. Strategic Partnerships are expected to contribute significantly to the overall impact of the Erasmus+ programme. This section is divided into impact on individual and organisational stakeholders in the project, and beyond.

What is the expected impact on the participants, participating organisations, target groups and other relevant stakeholders? Describe the expected impact on all the groups of individuals and the organisations directly involved in the delivery of the project or affected by the project. Such stakeholders may include your partner organisations, any trainers or learners involved in the project, education systems and economic sectors, if applicable. The content of this section should relate to the rationale and needs addressed in section E. Description of the project.

What is the desired impact of the project at the local, regional, national, European and/or international levels? Please describe the expected impact at local levels and beyond. Please be clear where the impact will be strongest. Depending on the size and scope of your project, you should describe how any innovations implemented during the project may impact on systems or policies, and how impacts may be relevant to other Erasmus+ programmes and wider EU activity.

How will you measure the previously mentioned impacts? How will you measure whether you have achieved the expected impacts? Please describe the means you will use, and, if known at this stage, your indicators of achievement, or how you will develop them. You should propose concrete plans for monitoring and evidencing impact, including quantitative and qualitative methods. You may choose to measure impact both within the life of the project and after the funding has ended. For more information about assessing impact and useful resources, please visit the 'Impact' section on our website.

H.2. Dissemination and Use of Project Results

Dissemination means communicating the project successes and results as widely as possible.

Dissemination and use of project results is an important focus of Erasmus+. Please refer to Annex II of the Programme Guide, pages 308 – 311, for practical guidance for beneficiaries on dissemination and exploitation of results. Effective dissemination and exploitation of results helps to inform others about the results and outcomes of your project, widening the potential for impact and sustainability.

Results should be developed in such a way that they are accessible and can be adapted for use by others, and shared as widely as possible. This could include use in other sectors, other countries, after the project has ended, or to influence policy.

The plans outlined in this section should be appropriate for your project and the target audiences that you plan to disseminate to. Describe how you will maximise the impact for participants and other stakeholders into the future.

Your plan should include:

- measureable, realistic objectives;
- a timetable;
- resource planning; and
- Involvement of target groups, where possible.

What will the target groups of your dissemination activities inside and outside your partnership be? Define target audience(s) at local/regional/national/EU level. Clearly describe target audiences, justify your choice of these audiences, and explain why these audiences have been chosen. They could include your own organisations, people/organisations that have participated in your activities, stakeholders, decision makers, the press, the general public, etc. You should include details of how European stakeholders and Adult Education organisations will be approached in order to share the results of the project.

Which activities will you carry out in order to share the results of your project beyond your partnership? Clearly describe the activities you intend to carry out to disseminate your project and its outcomes to a wider audience. Link the plans back to your project activities and outputs to show how they are relevant and describe what means (media channels, events etc.) you will use. How will you monitor your dissemination activities throughout the project? Include this in your project timetable that you upload to your application, including any monitoring. If relevant, explain how your plans might change in line with changing needs of target groups or context. You should plan for the project to be promoted throughout its lifetime, not only, for example, via a Multiplier Event held at the end of the project.

You may use a wide variety of media, and innovative means of dissemination are welcome. You may apply for funds (Exceptional Costs) to translate any materials into the languages of project partners, provided it is sufficiently justified why the partners cannot do this themselves.

Who will be responsible for the dissemination activities within your partnership and which specific expertise do they have in this area? What resources will you make available to allow for the proper implementation of your dissemination plans? You are asked to describe which partners will undertake the dissemination activities, what expertise they will bring, and what resources (staff days as well as physical resources) you will make available to implement the plans described in this section.

Important note: Erasmus+ promotes the open access of project outputs. Refer to page 8 of the Programme Guide for further details. Any educational materials or tools produced by the project must be made easily accessible, without cost or excessive limitations, using open licences. Such materials are known as 'Open Educational Resources' (OER). Resources should be available in an editable digital form, on a suitable and openly accessible platform. Erasmus+ encourages beneficiaries to apply the most open licenses possible. As a minimum, licences must allow the public to use, reuse, adapt and share the resource. This is a compulsory requirement for Strategic Partnership projects.

All Strategic Partnerships are required to make the results and outputs of their projects available via the Erasmus+ Project Results Platform at the end of the project:
http://ec.europa.eu/programmes/erasmus-plus/projects

Open access: How will you ensure that the project's results will remain available and will be used by others? Clearly explain how each result and Intellectual Output (if applicable) produced will be shared with others upon completion and how you will ensure that they remain accessible and can be used by others. Give details of the type of open licence you intend to use in order to meet the Erasmus+ open access requirement. If you intend to put any limitation on the use of the open licence, you must explain the reasons, extent and nature of this limitation. You will need to make your main project outcomes available on the Erasmus+ Project Results Platform once they are finalised; however, you should have appropriate plans for dissemination, open access and sustainability beyond this alone.

Additional information: You may add any further information in the last part of this question, with reference to the selection criteria and the Programme Guide.

H.3. Sustainability

Sustainability can be defined as the potential for continuation of the project's activities, outcomes and impacts after the Erasmus+ funding has finished. Sustainability includes, but is not limited to, obtaining further funding for activities. It can also refer to the integration of results and innovation into the management or pedagogy of participating organisations or ways in which new curricula will be updated.

What are the activities and results that will be maintained after the end of the EU funding, and how will you ensure the resources needed to sustain them. Please explain which aspects of your project you plan to maintain after the Erasmus+ funding finishes, how you will do this and what resources, including financial resources, you will use to assure sustainability. You may wish to reference your dissemination activities and use of results described in the previous section.

I. Budget

Important note: The Erasmus+ grant is intended as a **contribution** to your project costs and may not cover the total cost of your project. The maximum grant that can be awarded for a Strategic Partnership project is up to €450,000 for the maximum duration of 36 months (i.e. up to €12,500 per month). Please refer to pages 118 – 127 of the Programme Guide for full details of the budget rules and requirements. Maximum limits apply to certain budget headings in order to prevent disproportionate spending on one type of activity.

When applying for a Key Action 2 Adult Education project you can apply for funding for the following cost headings on a **unit cost** basis (i.e. per participant/organisation/meeting/job category):

- Project Management and Implementation;
- Transnational Project Meetings;

- Intellectual Outputs (if applicable – 'Innovation' projects only);
- Multiplier Events (if applicable – 'Innovation' projects only); and
- Learning, Teaching and Training Activities (if applicable).

Useful tip: Unit costs can be described as a set amount, calculated based on defined variables, which is a contribution towards the project costs. For some unit costs you will spend more and for some perhaps less than the unit cost. Unit costs are intended to help make the funding simpler to understand and manage.

The following budget headings are based on an estimate of the **likely actual costs** and need to be duly justified in the application:

- Exceptional costs (related to subcontracting);
- Special needs support; and
- Exceptional costs related to expensive travel costs for Training, Teaching and Learning activities.

Useful tip: For actual or 'real costs' budget items, as the name suggests, you will receive funding for a percentage of the eligible actual costs incurred. In your application, you will need to provide a reasoned estimate of the likely costs, as well as a detailed justification for why the costs are required.

You must calculate a project's provisional budget at the application stage according to the rates outlined below. Please note: if you miscalculate your budget and request less than you are entitled to, you will only receive up to the amount requested. You must ensure that the budget provided is correct and consistent with the activity described in your application form before submitting your application, as the UK National Agency cannot award any funding above the amount requested.

Important note: When completing the budget section of the eForm it is important to note that automatic calculations only take place when you press the 'Validate' button on the relevant page of the eForm. You will need to be connected to the internet for the page to update, and you will need to press the Validate button on each of the budget pages as you go through the eForm.

The European Commission's technical guidelines contain more detailed technical advice and guidance on completing the budget section of the eForm, and you may find it helpful to refer to this document as you complete section I of the eForm. The technical guidelines for the 2018 Call are available on the Erasmus+ UK website.

Your budget should be appropriate to your planned activities and demonstrate a cost effective use of resources. Several of the budget headings are conditional on your demonstrating added value, so, for example, transnational project meetings should be limited to those which cannot be replaced by emails or teleconferences.

Some fields of the budget section are pre-filled with details of your activities.

Useful tip: Please ensure that the amounts you have entered are consistent across the whole budget section, otherwise the form will not validate.

I.1. Project Management and Implementation

The unit cost for this budget heading is calculated based on the number of partners and the duration of the project. The total amount is calculated based on €500 per month for the Coordinator and €250 per month for each of the other partners. This will populate automatically based on the number of participating organisations and project duration.

The maximum sum available for project management and implementation is €2,750 per month.

There is no maximum number of partners you can include. However, the budget for project management and implementation is capped at the equivalent amount for 10 partners (1 coordinator/applicant and 9 partners).

Please check carefully and validate before moving on to the next section.

I.2. Transnational Project Meetings

Grants are paid according to a unit cost per participant as a contribution to travel and subsistence costs, with a different unit cost for short (€575 per participant per meeting) and long distance travel (€760 per participant per meeting).

You must use the European Commission's **distance calculator** tool to calculate the appropriate distance band: http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm. Please note that the 'travel distance' indicates the distance for a *one-way journey* but the travel costs have been calculated for a *return journey.*

There should be consistency between this budget section and what you have described in section E.

You need to enter the following information, referring back to the plans outlined earlier in your application:

- the total number of meetings and identifier for each generated by the system – please note it is the total number of meetings you (or your partners) will **travel to**; therefore any meetings hosted by you (or by your partners) should be excluded here;

- the PIC for the organisations taking part in each meeting; and
- the total number of participants against each distance band (see page 133 of the Programme Guide) – please keep in mind that this is the overall total of participants attending all meetings, per distance band.

Please check your information and then validate it.

I.3. Intellectual Outputs *(**only** applicable for 'Innovation' projects)*

Grants are calculated based on set rates per staff category, per working day and by country group, with different rates for each of the staff categories (see below) and groups of countries (see page 125 -126 of the Programme Guide). The staff categories relate to the type of role the individual will undertake in the development of the Intellectual Outputs, rather than their job title or role.

You need to enter the following information, referring back to the plans outlined earlier in your application:

- the PIC of organisations contributing to each output;
- your Intellectual Outputs and the identifier for each generated by the system;
- the categories of staff participating - the category into which an individual falls depends on their **role** within the project, not their job title;

Important note: Staff costs for the roles of 'Manager' and 'Administrative support staff' are expected to be covered under the 'Programme Management and Implementation' component of the grant, therefore if any additional funding is requested under Intellectual Outputs for these staff categories, it must be clear from your narrative why it is needed and how it will be used. If the type and volume of staff costs for the development of an Intellectual Output are not sufficiently justified, these costs might be reduced or removed when your application is assessed.

You can use the text box 'Please provide any further comments you may have concerning the above entered budget' below the budget tables to provide a clear justification.

The four **staff categories** for Intellectual Outputs are:

- Managers – requires detailed justification
- Teachers/Trainers/Researchers
- Technicians
- Administrative support staff – requires detailed justification

- **Country of the Organisation** – this will be pre-filled.
- **Number of Working Days** – this should be the number of days developing the Intellectual Output.
- **Grant per day** – this will be pre-filled.
- **Grant Requested** – this will be pre-filled.

Please check your information and then validate it.

I.4. Multiplier Events *(**only** applicable for 'Innovation' projects)*

Multiplier events funding covers events aimed at disseminating the Intellectual Outputs realised by the project. You must therefore have requested funding for Intellectual Outputs to be eligible to receive support for organising Multiplier Events. As stated earlier in this guide, Multiplier Events should normally be planned to take place at a stage when the respective Intellectual Output has been substantially developed. Piloting and training event costs are not eligible under Multiplier Events. Please refer to the definition of a Multiplier Event on page 122 of the Programme Guide.

Important note: Only participants from organisations **other than** the organisations participating in the project (i.e. partners) can be counted in the number of local/international participants for the purposes of determining the grant amount for Multiplier Events. Grants are paid as a unit cost per participant, based on two categories: per local participant and per international participant. Local participants are participants based in the country where the Multiplier Event will take place. International participants are from other countries.

You need to enter the following information, referring back to the plans outlined earlier in your application:

- the PIC of organisations contributing to each event;
- planned events and the identifier for each generated by the system;
- number of local (host country) participants; and
- number of foreign (i.e. international) participants.

Please see page 122 of the Erasmus+ Programme Guide for the Multiplier Events unit cost rates. **The maximum sum available for Multiplier Events funding is €30,000 per project.**

I.5. Learning/Teaching/ Training Activities

I.5.1. Travel

This is a contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return. Travel is based on the distance travelled for each participant and is defined as the cost of the entire journey (including airport transfers) from the UK point of origin to the specific venue of activity. Travel is calculated on a unit cost basis and will be payable according to the travel distance and the number of participants. Please note that the 'travel distance' measures the distance for a *one-way journey* but the travel costs have been calculated for a *return journey.*

You must use the European Commission's distance calculator tool to calculate the appropriate distance band: http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm. The distance bands are set out below:

Travel distance between:	**Amount per participant, for travel costs from their place of origin to the venue of the activity and return**
10 - 99 km	€20
100 - 499 km	€180
500 - 1999 km	€275
2000 - 2999 km	€360
3000 - 3999 km	€530
4000 - 7999 km	€820
8000 km +	€1500

In addition to the rates in the table above, where applicable and **only if justified** in the application form, it is possible to request Exceptional Costs for Expensive Travel Costs for Teaching, Training and Learning Activities. Exceptional Costs for Expensive Travel Costs are claimed separately from standard travel, in section I.5.4 of the application and can only be claimed if the unit costs outlined above will not cover at least 70% of the travel costs. Please see page 124 of the Programme Guide and section I.5.4 of this guidance for further details.

You need to enter the following information, referring back to the plans outlined earlier in your application:

- the PIC of organisations contributing to each activity;
- your activity and the identifier for each generated by the system;
- number of participants (including any accompanying persons); and
- distance band (please note that distance is *one-way*, but the travel costs have been calculated for a *return journey*).

I.5.2. Individual Support

Individual support is a contribution to the day-to-day living costs incurred by participants and, where applicable, accompanying persons during the mobility activity. This includes accommodation, food and insurance as well as local travel to and from the venue of the activity in the host country.

Individual support is calculated on a unit cost basis as detailed on page 123 - 124 of the Erasmus + Programme Guide and will be payable according to the country of destination, the duration of the activity and the activity type.

Individual Support - Long-term learning/teaching/training activities: you need to enter the following information, referring back to the plans outlined earlier in your application:

- the PIC of organisations contributing to each activity;
- your activity number and type;
- the destination country;
- the number of participants without accompanying persons; and
- the number of accompanying persons.

Individual Support - Short-term learning/teaching/training activities: you need to enter the following information, referring back to the plans outlined earlier in your application:

- the PIC of organisations contributing to each activity;
- your activity number and type;
- the number of participants without accompanying persons; and
- the number of accompanying persons.

Please check your information and then validate it.

I.5.3. Linguistic Support

Linguistic Support refers to costs linked to the support offered to participants to improve their knowledge of language of instruction or work during a mobility activity. This type of support is only available for long-term mobility activities lasting between 2 and 12 months. You must clearly justify the need for financial support, including providing an explanation of how you expect the linguistic support to be delivered and how the funding will be used. Linguistic support is calculated on a unit cost basis and awarded at a rate of €150 per participant needing linguistic support.

You need to enter the following information, referring back to the plans outlined earlier in your application:

- the PIC of participating organisations;
- your activity and the identifier for each generated by the system; and
- the number of participants needing linguistic support.

I.5.4. Exceptional Costs for Expensive Travel Costs

It is possible to request Exceptional Costs for Expensive Travel Costs in cases where the standard unit costs for travel (see I.5.1 above) will not cover at least 70% of the travel costs of participants, for **duly justified reasons**. In such cases it is possible to request up to 80% the expected actual costs.

Important note: Exceptional Costs for Expensive Travel Costs are only applicable for participants in Teaching, Training and Learning Activities. They must be fully justified within the application form. This includes explaining the reasons why the additional costs are required and what they will cover. When explaining why the costs are required, you should explain why the standard unit costs for travel will not cover at least 70% of the expected costs. You should cite up to date evidence of the likely travel costs in your explanation. The explanation should be included in the box 'Purpose and description of costs. The character limit is 5000 characters for this box. If the requested costs are not sufficiently justified, they may not be approved.

To complete this section you will need to enter the following information:

- the PIC of participating organisations
- your activity and the identifier for each generated by the system;
- the number of participants (including any accompanying persons);
- the purpose and description of the costs – provide a **detailed** justification here; and
- the grant requested (up to 80% of eligible costs).

I.6. Special Needs

Special Needs Support refers to costs directly relating to participants with disabilities, including participants with special needs and accompanying persons participating in transnational teaching, training and learning activities. Any costs requested under this budget heading must not already be covered by the travel or individual support budget headings, and will need to be clearly justified in the application.

Useful tip: A person with specific needs is defined as a potential participant whose individual physical, mental or health-related situation is such that his/her participation in the project would not be possible without extra financial support.

Special needs support is calculated on an actual cost basis and will be assessed on a case by case basis, based on the justification provided in the application form. The individual situation should be described and any particular needs and extra costs should be clearly outlined. We encourage you to break the costs down in as much detail as possible and to justify the need each cost in the body of your application and/or in the last text box under the budget section: 'Please provide any further comments you may have concerning the above entered budget'.

It may not be possible to provide extra funding for participants with special needs which has not been included in your original budget.

You need to enter the following information into the application form:

- the PIC of the relevant participating organisations;
- the number of participants with special needs;
- description of special needs (please note: there is 5000 character limit available for you to fully justify your request); and
- the grant you are requesting.

Please see page 121 of the Programme Guide for more information.

I.7. Exceptional Costs

Erasmus+ will fund up to 75% of costs relating to subcontracting or the purchase of goods and services. However, funding must only be requested for items which **cannot** be provided by the project partners. You must therefore provide detailed justification for your request for Exceptional Costs within the body of your application and/or in the last text box under the budget section: 'Please provide any further comments you may have concerning the above entered budget'. You should break down the exceptional costs requested and clearly explain why the additional funding is needed.

Useful tip: Examples of items that are **not** eligible to be covered under this budget heading are:

- visas for partners to travel to consortium meetings (these should be listed under project management and implementation for the appropriate organisations);
- smartphones;
- Multiplier Event costs (these should be listed under the dedicated budget heading);
- training and dissemination activities (these should be listed under management and implementation); and
- office equipment which would normally be provided by the partners in the day to day running of the partner organisation.

Costs for providing a financial guarantee (if requested by the UK National Agency) should be included in this budget category, if applicable. As mentioned above you can request 75% of eligible costs. If you are unsure of how to input Exceptional Costs relating to a Financial Guarantee, please contact the UK National Agency for advice.

You need to enter the following information into the application form:

- the PIC of the relevant participating organisations;
- description of cost item; and
- the grant requested – please note you should enter 75% of the total grant requested only.

Please see page 121 of the Erasmus+ Programme Guide for further information.

The maximum sum available for Exceptional Costs is €50,000 per project.

J. Project Summary

Please provide a concise summary of your proposed project in the communication language of the partnership. As you develop your summary, please bear in mind that it may be used by the European Commission, the UK National Agency and other agencies for publicity purposes and will be published on the Erasmus+ Project Results Platform. Your summary should include at least:

- context/background of project;
- objectives of your project;
- number and profile of participants;
- description of activities;
- methodology to be used in carrying out the project;

- a short description of the results and impact envisaged; and
- the potential longer term benefits.

If your application is successful, this project summary will need to be updated at the end of the project to give a description of the completed project and results.

J.1. Summary of Participating Organisations

This field should fill automatically. Please check it carefully before validating.

J.2. Budget Summary

This is a table providing an overview of the activity number, activity type and grant requested for the project.

The values shown in the Budget Summary are calculated automatically on the basis of the values calculated and/or entered in the detailed budget sections. Any corrections (for example because you forgot to include a certain grant request) will need to be made in the detailed budget sections, not in the Budget Summary. Please ensure that all amounts you have entered above are correct before submitting your application.

J.2.1. Project Total Grant

This pre-populated table contains the total combined grant calculated for the project. It is imperative that you check that this amount is correct against your own calculations and resolve any issues before submitting your application.

Please be aware that if you are successful, the UK National Agency will not be able to award you any more than you have requested.

K. Checklist

Before submitting the application, please make sure that it fulfils all the requirements listed below:

- you have used the official 2018 Call Key Action 2 application form for Adult Education;
- all mandatory fields in the application form have been completed, otherwise the application will not validate or submit correctly;
- the application form is submitted to the National Agency of the country in which your organisation is established (i.e. the UK National Agency);

- the application form has been completed using one of the official languages of the Erasmus+ Programme Countries;
- you have annexed all the relevant documents:
  - the **Declaration of Honour** signed by the legal representative identified in section D.1.3 of the application; please ensure that all required details (place, date and name) have been completed and that the date indicated is on or before the submission deadline;
  - the **mandates** of **each partner** to the applicant signed by both parties; the mandate template which must be used can be downloaded from Erasmus+ UK website - please note the below when preparing mandates:
    - the legal signatory named on the partner mandate must be the person who signs the document and the same person identified in section D.1.3;
    - the organisation name (of the partner and coordinating organisation) stated in the partner mandate must match with the application form. the organisation's legal entity information (legal form, registration number and VAT) stated in the partner mandate must match with the organisation's legal details in the Participant Portal;
    - partner mandates must be completed in full, dated and signed (original signatures) in the relevant place as indicated on the mandate template; the UK National Agency will not accept signatures on a different page or mandates without a date or place clearly indicated;
    - partner mandates must be legible and preferably in English;
    - organisations' details (name, address, VAT and registration numbers as well as the legal status) must be identical to the details on the Participant Portal; the UK National Agency will not accept any spelling errors in names or incomplete addresses; and
  - the **Project Timetable Spreadsheet** – the template is available to download from our website. When filling this out, you should follow the guidance provided below the table regarding the numbering and make sure you use the same numbering in the body of the application form. Ensure you include all activities in this timetable and carefully consider the timing of activities to ensure they are realistic, achievable, and will support the delivery of the project objectives;

- all participating organisations have uploaded the documents to give **proof of legal status** in the Participant Portal (for more details, see the section 'Proof of Legal Status and Financial Capacity' in Part C, pages 244 – 245 of the Programme Guide);
- for grants exceeding €60 000, you have uploaded the documents to provide **proof of financial capacity** in the Participant Portal (for more details, see the section 'Financial Capacity' in Part C, page 248 of the Programme Guide) - this is not applicable if the applicant is a public body or an international organisation;
- you are complying with the deadline published in the Erasmus + Programme Guide;
- the project start date is between **1 September 2018** and **31 December 2018**;
- the duration is between 12 and 36 months; and
- you have saved or printed a copy of the completed application form for your records.

Important Note: Organisations need to upload supporting documents as a proof of their legal status. Please ensure that there is consistency of information regarding your organisation's legal details in the Participant Portal, Application form, Legal Entity form, Financial Identification form and that these match with the supporting documentation provided by your organisation.

L. Data Protection Notice

You are required to read the data protection notice in advance of signing the Declaration of Honour. The Specific Privacy Statement referred to in this section can be found on our website.

M. Declaration of Honour

This is your organisation's statement that all information in the application is correct to the best of your knowledge, there is no conflict of interest, and you will take part in dissemination and exploitation activities if required. It expresses a commitment to the activities you have outlined in the application form.

Important note: The legal representative who signs the Declaration of Honour needs to be aware that any administrative and financial penalties may be imposed on the organisation they represent if it is guilty of misrepresentation or is found to have seriously failed to meet its contractual obligations under a previous contract or grant award procedure.

The legal representative of the applicant organisation must print the Declaration of Honour, read it carefully, complete the declaration section by hand and sign it. Please note the National ID and

organisation stamp are not required in the UK. The signed Declaration of Honour then needs to be scanned and attached as an annex before the application form is submitted online.

It is essential to submit the Declaration of Honour. Failure to submit the Declaration of Honour signed by the legal representative will result in your application being ineligible.

N. Annexes

The following documents **must** be annexed to the application form:

- the Declaration of Honour signed by the legal representative mentioned in the application;
- the mandates of each partner to the applicant signed by both parties, where available (see section K above for further information and requirements); and
- the Project Timetable Spreadsheet template.

You must ensure that all documents specified in the checklist (see section K) are submitted electronically with the application. To attach documents click the 'Add' button on the right hand side of the box displayed. This will then open up an additional window which will allow applicants to browse files on your computer and upload.

Only 10 documents can be annexed to the application form, so we would recommend that multiple documents such as partner mandate forms are scanned into a single file. The total size of the documents also must not exceed 10.24 MB, otherwise the application will fail to submit properly (producing an 'ERR-06' submission code – see section O below for more details).

Please note that only .pdf, .doc, .docx, .xls, .jpg, .txt, .odt, .ods, .cdoc, .ddoc and bdoc files can be submitted electronically with an application. No other files will be accepted. A file which has been added in error can be removed by clicking the 'remove' button which replaced the 'add' function on the right hand side of the table.

If, after checking that the annexes are within the size and file format limits, you still experience problems with attaching annexes, you can email them to erasmusplus@ecorys.com clearing stating which application form they relate to, by providing the application hash code, and your organisation's details and project name.

O. Submission

O.1. Data Validation

You must ensure you have validated all sections of the application before submitting. You can do so while you work your way through the application form as there is a 'validate' button at the bottom of

every page. If any of the compulsory text boxes have been left blank or completed incorrectly, you will be directed to them when clicking on the 'validate' button.

Before you **submit** the form, you need to ensure that your form is validated first. Submitting your form (successfully) will mean the NA has received your application for funding.

Important note: The application form needs to be validated as you go through the individual sections in order to ensure that the data entered is correct and in line with the rules and requirements. However, you also need to validate the form a final time before you submit it, as additional errors, which will need to be rectified, may be identified at this stage.

O.2. Standard Submission Procedure

1. You should only submit your application form once you are completely happy with the finalised version. You should aim to do this in good time before the application deadline.

2. You need to ensure that you are connected to the internet in order to submit your completed application.

3. You should ensure that all sections of the form are valid and all annexes are attached before submitting the form.

4. The UK National Agency recommends that you save the final completed version of your application eForm on your desktop before attempting submission, in case of any technical issues.
5. To submit the form you should click the 'Submit Online' button. The submission attempt will be recorded in the Submission Summary table.

6. If the form has been successfully submitted it will say 'Online submission' under Event and 'OK' and the submission ID under Status.

7. If there is any technical issue preventing the form from being submitted it will say 'Error' under Status. If this happens and you are unable to submit the form following the steps above, you should follow the Alternative Submission Procedure. Please refer to the guidance below regarding which error codes can be accepted.

8. Issues identified when validating the form which are not resolved before submission are **not** classed as a technical issue.

9. Your application must be submitted online by the deadline: **11am (UK time) on Wednesday 21 March 2018**.

10. If an application is submitted after this deadline, and the alternative submission procedure outlined below is not completed in time, or if the form cannot be accepted via the alternative submission procedure, the application form will be made ineligible.

O.3. Alternative Submission Procedure

If you are unable to submit your application online due to technical issues you must take the following action:

1. Take a screenshot of the submission summary page demonstrating the eForm could not be submitted online.

2. Email this to the UK National Agency NA at erasmusplus@ecorys.com along with a copy of your completed application form and any annexes **within 2 hours** of the application deadline (i.e. no later than 1pm UK time). In the subject line of the email please put: Key Action 2 application form – [insert the name of your organisation].

If you cannot submit your eForm online due to an error message i.e. 'ERR-' (but not ERR-01 unless in the circumstances outlined below or ERR-06) you can still submit it by sending an email to us within the 2 hours of the official deadline. However, the UK National Agency will only accept this submission if the error message is recorded under 'Status' in the 'Submission Summary' section of the eForm with a timestamp prior to or on the deadline date/time.

If any of the following 'Statuses' appear in the 'Submission Summary' your application **will not** be accepted under the Alternative Submission Procedure:

1. **ERR-01**: This normally relates to invalid data/missing fields in the eForm. Where this is the case it will not be considered a technical issue as it can be rectified by correcting the application form and validating it again.

2. **ERR-06**: This means that there are errors with the annexes (i.e. the total size of the attachments exceeds 10.24 MB or they are in not file formats specified above in section N). This can be rectified either by reducing the size of the attachments or by removing them.

3. **Unknown**: This means that the eForm was not submitted and no submission attempts were made.

4. **LOCAL-01 Adobe Reader security enabled**: In order to submit the eForm you must click the appropriate options in the yellow security warning bar at the top of the form.

   This is not an error with the form but an error with your computer or network security settings. The warning appears because your network or computer is identifying that the contents of the PDF file may harm your computer. This does not however necessarily mean that the PDF is dangerous.

With Adobe Reader 8.2 & 9.3 and later, users can trust documents on-the-fly when the PDF opens. When the Yellow Message Bar appears, choose the Options button and then trust the document once or always.

If the warning does not contain the “Options, Allow, or Play” button it means that your administrator has disabled this feature. You cannot choose to trust or allow this content. You should click the Close or Cancel button to hide the warning. You will then be able to view the PDF, but will not be able to access the blocked content i.e. submit the form online. You should then contact your network administrator for more information. For more information about External Content Access through Adobe Reader please visit this hyperlinked Adobe Webpage

5. **LOCAL-02 Network connection error**: In order to submit the eForm you should check your internet connection and try to submit the form again or try a different network connection.

   If the error message is persistent even when attempting to submit the eForm while connected to the internet, the applicant should check their firewall settings. It is likely that the firewall or network settings are preventing the form from accessing the internet and submitting online. If the problem continues to persist you should check your firewall and network settings or consult your network administrator.

O.4. Submission Summary

A record of submission attempts made for the form will be recorded here. This should be used in the above instance when an alternative submission procedure is required.

O.5. Form Printing

The UK National Agency advises printing the final completed version of your eForm and retaining it for your own records. However, hard copies of the eForm **do not need** to be posted to the UK National Agency.

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Application Checklist

☐	Have you used the correct official application form: KA2, Adult Education, deadline 21 March 2018?
☐	Have you checked whether the start and end dates of your project are in the correct format? **(Please note some sections can be amended manually)**
☐	Is your project start date between 1 September 2018 and 31 December 2018?
☐	Is your project duration between 12 months and 36 months?
☐	Have you checked that your partner has provided you with a correct PIC number?
☐	Have you checked that your partners' details are up-to-date and consistent between the application form, Participant Portal and their Legal Entity Form?
☐	Have you checked that the budget figures are correct and consistent throughout the whole application form?
☐	Have you included sufficient justification for the activities and budget requested, where required?
☐	Have you cross-checked the content of your application with the eligibility criteria and award criteria in the Programme Guide?
☐	Have you checked that all the mandatory fields (red boxes) are completed?
☐	Have you printed, signed, scanned and annexed the Declaration of Honour?
☐	Have you attached signed mandates for each of your partners?
☐	Is the information on the mandates consistent with the Participant Portal and Legal Entity Form?
☐	Have you attached the Project Timetable Spreadsheet?
☐	Have you validated your form? (make sure you are connected to the internet)
☐	Have you saved the final version of your application to your desktop before attempting submission?
☐	Have you submitted the final form online?

☐	Does the submission status show 'OK'?
☐	Have you submitted your application before the deadline of 21 March 2018 (11am UK time)?
☐	Have you printed a copy of your Application Form for your own records?

After submitting your application

Once you have submitted your application you will receive an acknowledgement email. If you have not heard back from us within four weeks of the deadline after submitting your application, then please get in touch to check it has been received successfully by calling the Erasmus+ helpline on +44 (0) 121 212 8947 or by sending an email to erasmusplus@ecorys.com.

All applications are checked for eligibility, and eligible applications will be assessed for quality. An Evaluation Committee then meets to review the applications. The highest scoring applications are selected, based on the budget available.

You will be informed of the outcome by email and grant agreements will then be issued to successful applicants.