



KA1 ERASMUS+ courses for headmasters, teachers and school staff

EUROPEAN SCHOOL DEVELOPMENT: PLANNING AND MANAGING ERASMUS+ PROJECTS

Rome, Italy – 2017

WELCOME TO *ROME!*



WHO IS WHO



ERIKA NEMES

Expert in EU funds, budget
and financial reporting



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Expert in EU funds,
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policies





Agenda!

1. Basic Information and EU opportunities for schools
2. Budget in Erasmus Plus projects
3. Budget Management and reporting of Erasmus Plus projects
4. Strategic Partnership Application form (E-form)
5. Visit to a school

euphoria



BASIC INFORMATION

ERASMUS PLUS

euphoria

ERASMUS PLUS

ONE OF THE EUROPEAN UNION'S SEVEN-YEAR
PROGRAMME FOR 2014-2020



euphoria

THE TWO FORMS OF EU FUNDING MANAGEMENT

DIRECT MANAGEMENT

The fund or programme is directly managed by the European Commission or one of its agencies.

Direct: funds are transferred directly to beneficiaries by EU Commission or one of its agencies.

Centralized: the management involves selecting contractors, awarding grants, transferring funds, monitoring activities and others.

SHARED MANAGEMENT

The management of the EU fund or programme is **delegated** to EU countries.

Most EU-funded projects, accounting for around 80% of the EU budget, are under **shared management**.

Each EU country, in partnership with the Commission, agrees on one or more operational programme, setting out its funding priorities.



SOME EXAMPLES

DIRECT MANAGEMENT



SHARED MANAGEMENT



European Union
European Social Fund
Investing in jobs and skills



European Union
European Regional Development Fund
Investing in your future

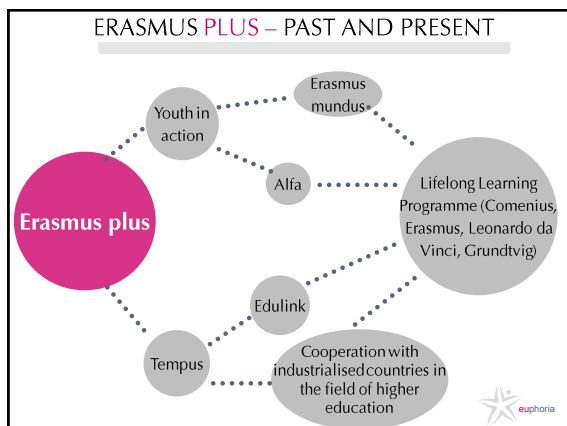


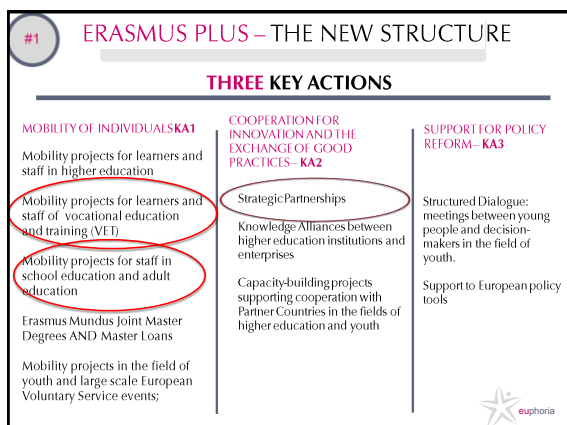


EU Programme in the fields of education, training, youth and sport:

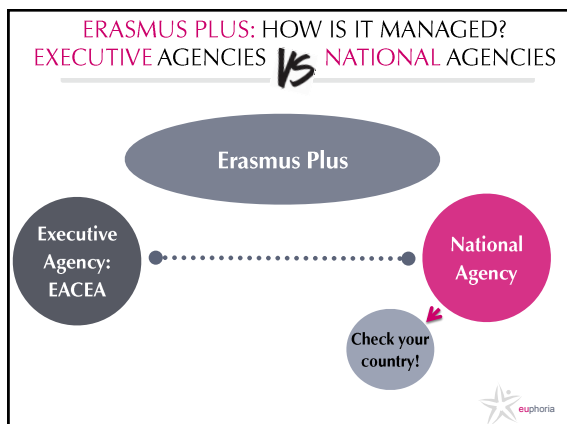
The programme for SCHOOLS!













LINKS BETWEEN PROJECTS AND EU POLICIES

Aims

The aim of Erasmus+ is to contribute to the European 2020 strategy for growth, jobs, social justice and inclusion, as well as the area of ET 2020, the EU's strategic framework for education and training. Erasmus+ also aims to provide the leadership development of its partners in the field of higher education, and contribute to achieving the objectives of the EU Youth Strategy. Specific issues tackled by the programme include:

- Reducing unemployment, especially among young people
- Promoting adult learning, especially for new skills and skills required by the labour market.
- Encouraging young people to take part in European democracy

Main mistakes in projects!
missing links to EU Strategy and policies

Tips & Tricks

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EDUCATION AND TRAINING SPECIFIC OBJECTIVES #1

Erasmus Guide
2017

improve the level of **key competences and skills**, with particular regard to their relevance for the **labour market and their contribution to a cohesive society**, in particular through increased opportunities for learning mobility and through strengthened cooperation between the world of education and training and the world of work;

foster **quality improvements, innovation excellence and internationalisation** at the level of education and training institutions, in particular through enhanced transnational cooperation between **education and training providers and other stakeholders**;



EDUCATION AND TRAINING SPECIFIC OBJECTIVES #2

promote the emergence and **raise awareness of a European lifelong learning** area designed to complement policy reforms at national level and to support the **modernisation of education and training systems**, in particular through enhanced policy cooperation, better use of EU transparency and recognition tools and the dissemination of good practices;

enhance the international dimension of education and training, in particular through cooperation between Programme and Partner-Country institutions

improve the teaching and learning of **languages and promote the EU's broad linguistic diversity and intercultural awareness**.

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2017



ERASMUS PLUS – THE PARTNERSHIP



ERASMUS PLUS – THE PARTNERSHIP

3 TYPES OF COUNTRIES (always check the updated Guide!)

EU PROGRAMME COUNTRIES	NON EU PROGRAMME COUNTRIES	PARTNER COUNTRIES
Belgium Bulgaria Czech Republic Denmark Germany Estonia Ireland Greece Spain France Croatia Italy Cyprus Latvia Lithuania Luxembourg Hungary Malta Netherlands Austria Poland Portugal Romania Slovenia Slovakia Finland Sweden <u>United Kingdom</u>	former Yugoslav Republic of Macedonia Iceland Liechtenstein Norway Turkey	All the other countries listed in the E+ Guide but be careful; their participation must bring an added value to your projects!



PARTNER SEARCH











DISSEMINATION AND EXPLOITATION

1. spread projects' results
2. contribute to the implementation and shaping of national and European policies and systems

External dimension

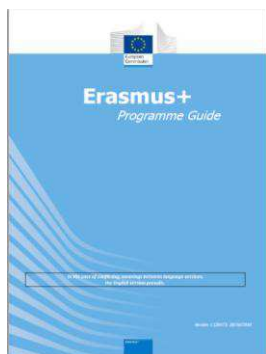
Internal dimension



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



ERASMUS PLUS – DOCUMENTS E GUIDES



ANOTHER PLUS GUIDE FOR EXTERNAL EVALUATORS

The relevance of the proposal to the objectives of European policies relevant to one or more fields of education, training and youth

National Agencies assess proposals with the assistance of independent experts to ensure that only those of the highest quality are selected for funding and that only organizations / consortia fulfilling specified criteria obtain a grant or accreditation.



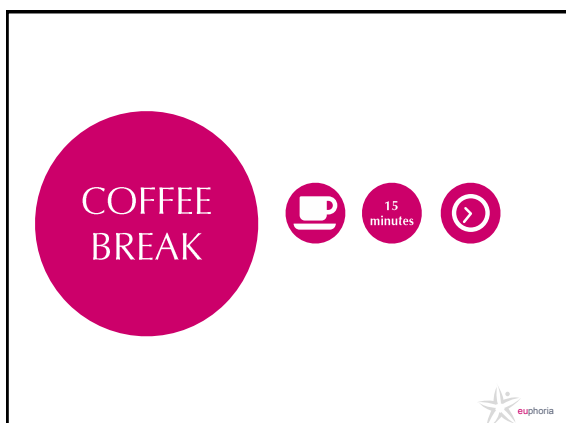
ANOTHER PLUS TECHNICAL GUIDELINES

If you have problems with the e-form:

Check the Technical guide









ERASMUS PLUS – THE NEW STRUCTURE

THREE KEY ACTIONS

MOBILITY OF INDIVIDUALS **KA1**

Mobility projects for learners and staff in higher education

Mobility projects for learners and staff of vocational education and training (VET)

Mobility projects for staff in school education and adult education

Erasmus Mundus Joint Master Degrees AND Master Loans

Mobility projects in the field of youth and large scale European Voluntary Service events;

COOPERATION FOR INNOVATION AND THE EXCHANGE OF GOOD PRACTICES – **KA2**

Strategic Partnerships

Knowledge Alliances between higher education institutions and enterprises

Sector Skills Alliances: supporting the design and delivery of joint vocational training curricula

Capacity-building projects supporting cooperation with Partner Countries in the fields of higher education and youth

SUPPORT FOR POLICY REFORM – **KA3**

Structured Dialogue: meetings between young people and decision-makers in the field of youth.

Support to European policy tools



ERASMUS PLUS – THE NEW STRUCTURE

TWO MORE ACTIONS

SPORT

Collaborative partnership

Small collaborative partnership

Not-for-profit European sport events

JEAN MONNET

Jean Monnet Modules

Jean Monnet Chairs

Jean Monnet Centres of Excellence

Jean Monnet Support to Associations;

Jean Monnet Networks (policy debate with the academic world);

Jean Monnet Projects (policy debate with the academic world).



SCHOOLS CAN PARTICIPATE AS MAIN CANDIDATES IN THE FOLLOWING ACTIONS/PROJECTS

#1 Mobility projects for school staff (KA1)

#2 Strategic Partnerships (KA2)

#3 Mobility projects for VET students and VET school staff (KA1 VET)

#4 Small collaborative partnership - SPORT



You see things; and you say 'Why?';
But I dream things that never were;
and I say 'Why not?'

-George Bernard Shaw



#2

WHAT IS A STRATEGIC PARTNERSHIP?

Strategic Partnerships aim to support the development, transfer and/or implementation of **innovative practices** as well as the implementation of joint initiatives promoting cooperation, peer learning and exchanges of experience at European level.



#2

WHAT IS A STRATEGIC PARTNERSHIP?

1) SUPPORTING INNOVATION

Develop **innovative outputs**, and/or engage into **intensive dissemination** and exploitation activities of **existing and newly produced products or innovative ideas**.

Dedicated budget for Intellectual Outputs and Multiplier Events in order to directly answer to the innovation aspect of the Action.

These types of projects are open to all fields of education, training and youth.

2) EXCHANGE OF GOOD PRACTICES

Develop and reinforce networks, increase their capacity to operate at transnational level, share and confront ideas, practices and methods.

May also produce tangible outputs and are expected to disseminate the results of their activities proportional to the aim and scope of the project (**co-financed** through budget for **project management and implementation**).

NB: NOT field of higher education



#2 ACTIVITIES IN A STRATEGIC PARTNERSHIP **#1**



Exchange of best practices

Activities that strengthen the cooperation and networking between organisations



Innovative practices

Testing and/or implementation of **innovative practices** in the field of education, training and youth



#2 ACTIVITIES IN A STRATEGIC PARTNERSHIP **#2**



Recognition and validation of knowledge, skills and competences

Facilitate the recognition and validation of knowledge, skills and competences acquired through formal, non-formal and informal learning



Cooperation between regional authorities

to promote the development of education, training and youth systems and their integration in actions of local and regional development



#2 ACTIVITIES IN A STRATEGIC PARTNERSHIP **#3**



Disabilities and special needs

Support learners with disabilities/special needs to complete education cycles and facilitate their transition into the labour market, including by combating segregation and discrimination in education for marginalised communities



Equity, diversity and inclusion

Prepare and deploy the education and training of professionals for equity, diversity and inclusion challenges in the learning environment



#2 ACTIVITIES IN A STRATEGIC PARTNERSHIP #4



Support to migration crisis

activities to promote the integration of refugees, asylum seekers and newly arrived migrants and raise awareness about the refugee crisis in Europe



Active citizenship and entrepreneurship

Transnational initiatives fostering **entrepreneurial mind-sets** and **skills**, to encourage active citizenship and entrepreneurship (including social entrepreneurship), jointly carried out by two or more groups of young people from different countries



#2 HORIZONTAL PRIORITIES #1

Inclusive education, training and youth. Actions addressing diversity in education and training, developing social, civic, intercultural competencies

Transparency and recognition of skills and qualifications to facilitate learning, employability and labour mobility

1


Improve achievement in relevant and high-level basic and transversal competences in a lifelong learning perspective, through formal or non-formal education and training

2

Open and innovative education and training embedded in the digital era, including supporting synergies between education, research and innovation activities, the digitisation of quality learning content and promoting the use of ICT

3

4



FIELD-SPECIFIC PRIORITIES	
VET	SCHOOL EDUCATION
Enhancing access to training and qualifications for all through CVET, in a life-long learning perspective, notably by increasing the quality, supply and accessibility of CVET, validation of non-formal and informal learning, promoting workplace learning in companies for the working population, providing for efficient and integrated guidance services and flexible and permeable learning pathways	Strengthening the profile of the teaching professions attracting the best candidates and supporting teachers to deliver high quality teaching, deal with complex classroom realities and adopt new methods and tools. In particular supporting teachers in dealing with diversified groups of learners (such as refugees, asylum seekers and migrants) and to adopt collaborative and innovative practice from the start of their careers to strengthen leadership roles in education, including distributed leadership, for designing necessary changes and improvements at institutional level
Further strengthening key competences in VET curricula and providing more effective opportunities to acquire or develop those skills through I-VET and C-VET	Addressing underachievement in the basic skills of math, science and literacy through more effective, innovative teaching methods.
Promoting work-based learning in all its forms	Supporting schools to tackle early school leaving
Further developing quality assurance mechanisms in VET, in line with EQAVET recommendation	Enhancing the quality of early childhood education and care (ECEC) in order to improve the quality of services for better learning outcomes and ensure a good start in education for all.

#3

WHO CAN PARTICIPATE #1?

"A **participating organisation** can be any public or private organisation, established in a **Programme Country** or in any **Partner Country of the world**"



#3

WHO CAN PARTICIPATE #2?

ELIGIBLE APPLICANT

KS

ELIGIBLE PARTICIPANTS

Any participating organisation established in a Programme Country can be the applicant

A participating organisation can be any public or private organisation, established in a Programme Country or in any Partner Country of the world

Guida Erasmus 2017 EN
Pag. 124



#3

ELIGIBILITY CRITERIA

A participating organisation can be any public or private organisation, established in a Programme Country or in any Partner Country of the world (see section "Eligible Countries" in Part A of this Guide).

For example, such organisation can be:

- a higher education institution;
- a school/institute/educational centre (at any level, from pre-school to upper secondary education, and including vocational education and adult education);
- a non-profit organisation, association, NGO;
- a public or private, a small, medium or large enterprise (including social enterprises);
- a public body at local, regional or national level;
- a social partner or other representative of working life, including chambers of commerce, industry, craft/professional associations and trade unions;
- a research institute;
- a foundation;
- an inter-company training centre;
- enterprises providing shared training (collaborative training);
- a cultural organisation, library, museum;
- a body providing career guidance, professional counselling and information services;
- a body validating knowledge, skills and competences acquired through non-formal and informal learning;
- a European Youth NGO;
- a group of young people active in youth work but not necessarily in the context of a youth organisation (i.e. informal group of young people¹⁰).

higher education institutions (HEIs) established in a Programme Country must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries, but they will have to sign up to its principles.



#3 **DURATION OF PROJECTS & NUMBER AND PROFILE OF PARTICIPATING ORGANISATIONS**

A Strategic Partnership involves **minimum three organisations** from three different Programme Countries, and lasts between 1 and 3 years


Exceptionally, the following types of projects may involve minimum **two organisations** from two different Programme Countries:

STRATEGIC PARTNERSHIPS FOR SCHOOLS ONLY Duration 1, 2 or 3 years	STRATEGIC PARTNERSHIPS FOR REGIONAL COOPERATION LED BY AT LEAST TWO LOCAL/REGIONAL AUTHORITIES FROM TWO DIFFERENT COUNTRIES Duration 2-3 years	STRATEGIC PARTNERSHIPS IN THE YOUTH FIELD !! Duration 6-12 months
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#3 **MOBILITY ACTIVITIES**

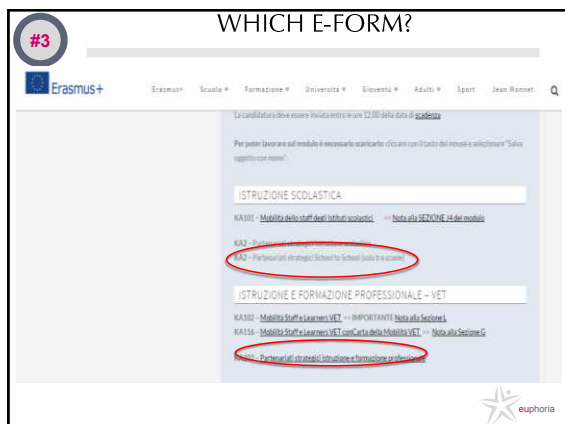
- Blended mobility of pupils and learners combining short-term physical mobility (5 days to 2 months; excluding travel days) with virtual mobility;
- Short-term exchanges of groups of pupils (5 days to 2 months; excluding travel days);
- Intensive Study Programmes for HE students (5 days to 2 months; excluding travel days), with invited HE teaching staff and other relevant HE experts ;
- Long-term study mobility of pupils (2 to 12 months);
- Long-term teaching or training assignments (2 to 12 months);
- Long-term mobility of youth workers (2 to 12 months);
- Short-term joint staff training events (5 days to 2 months; excluding travel days)



#3 **SCHOOL-TO-SCHOOL PROJECTS**

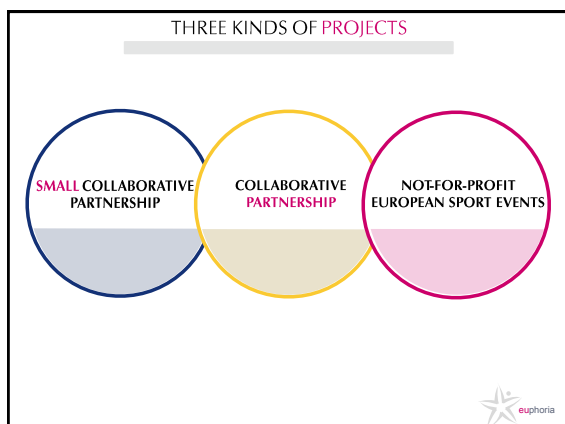
- School education projects;
- Exchange of good practices between different schools;
- It can include mobility activities;
- Mono-beneficiary agreements but project leader maintains the overall responsibility over the project;
- Each school receives its own grant.





SCHOOLS CAN PARTICIPATE AS MAIN CANDIDATE TO THE FOLLOWING ACTIONS

- #1** Mobility projects for school staff (KA1)
- #2** Strategic Partnerships (KA2)
- #3** Mobility projects for VET students and VET school staff (KA1 VET)
- #4** Small collaborative partnership - SPORT



SMALL COLLABORATIVE PARTNERSHIP

TOPICS AND AIMS OF PROJECTS

- 1 Encourage social inclusion and equal opportunities in sport, especially by supporting the implementation of EU strategies, notably the EU Gender Equality Strategy and the EU Disability Strategy;
- 2 Promote European traditional sports and games;
- 3 Support the mobility of volunteers, coaches, managers and staff of non-profit sport organizations;
- 4 Protect athletes, especially the youngest, from health and safety hazards by improving training and competition conditions.



SMALL COLLABORATIVE PARTNERSHIP


WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

do?

- networking among stakeholders;
- promotion, identification and sharing of good practices;
- preparation, development and implementation of educational and training modules and tools;
- awareness-raising activities on the added value of sport and physical activity in relation to the personal, social and professional development of individuals;
- activities to promote innovative synergies between the field of sport and the fields of health, education, training and youth;
- activities to improve the evidence-base of sport to tackle societal and economic challenges (collection of data underpinning the aforementioned activities, surveys, consultations, etc.);
- conferences, seminars, meetings, events and awareness-raising actions underpinning the aforementioned activities.

you can

Why



SMALL COLLABORATIVE PARTNERSHIP

WHO CAN TAKE PART IN A SMALL COLLABORATIVE PARTNERSHIP?

- School, universities or a public body in charge of sport at local, regional or national level;
- a National Olympic Committee or National Sport confederation;
- a sport organisation at local, regional or national, level;
- a national sports league or a sport club;
- an organisation or union representing athletes;
- an organisation or unions representing professionals and volunteers in sport (such as coaches, managers, etc);
- an organisation representing the 'sport for all' movement;
- an organisation active in the field of physical activity promotion;
- an organisation representing the active leisure sector;



SMALL COLLABORATIVE PARTNERSHIP

WHO CAN PARTICIPATE?


ELIGIBLE APPLICANT	VS	ELIGIBLE PARTICIPANTS
Any participating organisation established in a Programme Country can be the applicant		A participating organisation can be any public or private organisation, established in a Programme Country or in any Partner Country of the world



SMALL COLLABORATIVE PARTNERSHIP

ELIGIBILITY

HOW MANY?	HOW LONG?	WHERE?	HOW MUCH?
Three organizations coming from three different EU Programme Countries	Duration: 12, 18 or 24 months	Activities must take place in the countries (one or more) of the organisations involved	Max € 60.000 - Project management & implementation - TNP meeting

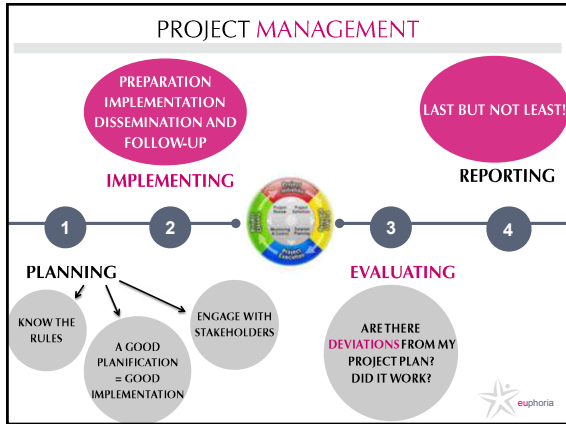


PROJECT MANAGEMENT

PHASES













KA1 ERASMUS+ courses for headmasters, teachers and school staff

EUROPEAN SCHOOL DEVELOPMENT:
PLANNING AND MANAGING ERASMUS+ PROJECTS

Rome, Italy – 2017

You Need A Budget.

Administrative and Financial management of the Erasmus Plus projects

Rome, Italy, 2017




B & R: THE WINNING COUPLE

BUDGET
Estimated costs of the project (attached to the application)

REPORTING
Financial statement detailing eligible costs
Dissemination Platform & # Mobility Tool

✓


SUCCESS

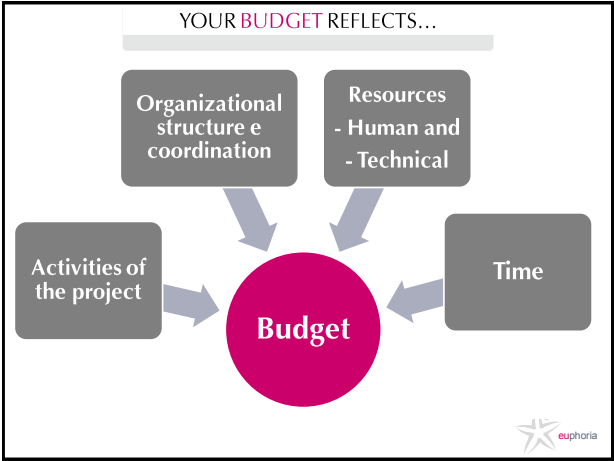


BUDGET

What does the budget means for the EC?

- **Sustainability** for the implementation of activities and achievement of objectives.
- **Explanation** of the use of resources.
- Structure and **standardization** of the payment process





THE BUDGET SHOULD BE...

Consistent

Detailed

Zero


In €uro

Consistent with the activities
"Maximize the results"

Fill in all sections of the e-form and attach obligatory annexes, both administrative and operational (eg. Gantt-chart, mandates, declaration of honour)

Revenues – Costs (including co-financing) = Zero
No profit!

in Euro!!
http://ec.europa.eu/budget/contracts_grants/info_contracts/infoeuro/index_en.cfm




4 PRINCIPLES APPLYING TO EU GRANTS #1

Principle 1.
Co-financing

•the EU grant may not finance the entire costs of the project. It's only an incentive.

Principle 2.
No-profit

•EU grants must not have the purpose or effect of producing a profit within the framework of the project




4 PRINCIPLES APPLYING TO EU GRANTS #2

Principle 3.
NON
retroactivity

• No EU grant may be awarded retroactively for projects already completed.


Principle 4.
NON-
cumulative
award


•One grant from EU budget (risk of double-financing)




4 PRINCIPLES APPLYING TO EU GRANTS #3

The **exception**
that proves the
rule



 Erasmus Guide EN 2017
Part C – page 244



4 PRINCIPLES APPLYING TO EU GRANTS #4

Non retroactivity:

Notification from your National Agency (*grant decision*) authorizing for project start;
Grant agreement signed by EC and legal representative of beneficiary.

Non-profit e co-financing:

If unit costs, the respect of the no-profit and co-financing principles is *assumed* by the EC.
No need to provide information about sources of funding other than the EU grant, nor you have to justify the costs incurred by the project.



Pay attention if you have budget-based costs (exceptional costs and special needs in KA1/KA2 and sport)!



4 TYPES OF EU GRANTS

- **Unit Costs:** reimbursement based on *fixed units*
€ 275/travel/500-1999km, €500/month/coordination KA2, € 350/persons organizational support KA1, € 100/person multiplier events KA2...
- **Real costs** (*budget-based*): a percentage of eligible costs + co-financing (e.g exceptional costs and special needs in KA1-KA2, Sport projects).
- **Flat rate:** a percentage to cover some cost items (see 7% indirect costs in Sport projects or 7% in Jean Monnet).
- **Lump sums:** contribute to the implementation of complementary activities (see Jean Monnet Project 25.000 € to cover other costs)



WHAT IS THE CO-FINANCING PRINCIPLE? >> INCOME

COSTS / EXPENSES		INCOME	
Eligible costs declared as:			
• Budget-based real costs		• EU grant (80%)	
• Forfait (<i>lump sums</i>)		• Income generated by the project	
• Unit costs		• Third-party contributions	
• Flat rate (% or declared)		• Other income	
+		• Own resources	
Other cost (non-eligible)			
+		+	
Contributions in kind (if eligible)		Contributions in kind (if eligible)	
=		=	
TOTAL COSTS / EXPENSES 100%	=	TOTAL INCOME 100%	



THE **FUNDING RULES** IN YOUR SCHOOL'S PROJECT #1

Budgeting
with **unit costs**




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Funding rules - **MIXED**
Unit costs & Budget based
(75% e 100%)

SCHOOL
EDUCATION
(also adult
education)

- Training
- Teaching




ELIGIBLE COSTS **KA1**

- **Travel** (based on distance, Distance calculator)
- **Top-up** Top-up for expensive domestic travel costs: 180€ (max two top-ups) (white board)
- **Organizational support** (€ 350/participant in mobility)
- **Individual support** (per diem, including travelling days. See your National Rules)
- **Course fees** (€ 70/day/person, max. € 700)
- **Special needs support** (budget based 100%)
- **Exceptional costs:** financial guarantee, if needed (not applicable for Public Administrations, budget based 75%)

Funding rules - **MIXED**
Unit costs & Budget based
(75% e 100%)

VET
students
&
staff



ELIGIBLE COSTS **KA1 VET**

Applicable to all types of mobility (students & staff):

- Travel
- Organizational support
- Special needs support (budget based 100%)
- Exceptional costs: participants with special needs (budget based 100%)
- Exceptional costs: financial guarantee (budget based 75%)

VET student mobility:

- Individual support (per diems, including travelling days)
- Linguistic support (long-term mobility 2-12 months and languages other than DE, EN, ES, FR, IT, NL)

VET staff mobility:

- Individual support (per diems, including travelling days)

Funding rules - MIXED

Unit costs & Budget based

(75% e 100%)

ELIGIBLE COSTS KA2



A) EXCHANGE OF GOOD PRACTICES

- Project management and implementation (€ 500/€250)
- Transnational project meetings (max. € 23.000/year)
- Exceptional costs (budget based 75%, max. € 50.000)
- Special needs support (budget based 100%)
- Training, teaching, learning activities (optional funding if project includes mobility)
 - travel
 - individual support (per diem)
- Linguistic support € 150 (only in long-term mobility 2-12 months and languages other than DE, EN, ES, FR, IT, NL)
- Exceptional costs – expensive travel to outermost regions (budget based 80%)

Grant: € 12.500/months for total project duration

Duration of project: between 12 and 36 months

Maximum grant: € 450.000 (3-year project)



Funding rules - MIXED

Unit costs & Budget based

(75% e 100%)

ELIGIBLE COSTS KA2



B) SUPPORTING INNOVATION

- Project management and implementation (€ 500/€250)
- Transnational project meetings (max. € 23.000/year)
- Exceptional costs (budget based 75%, max. € 50.000)
- Special needs support (budget based 100%)
- Intellectual outputs (4 types of human resources)
- Multiplier events (if there is output, max. € 30.000/project)
- Training, teaching, learning activities (optional funding if project includes mobility)
 - travel
 - individual support (per diem)
- Linguistic support € 150 (only in long-term mobility 2-12 months and languages other than DE, EN, ES, FR, IT, NL)
- Exceptional costs – expensive travel to outermost regions (budget based 80%)

Grant: € 12.500/months for total project duration

Duration of project: between 12 and 36 months

Maximum grant: € 450.000 (3-year project)



QUESTION TIME



Funding rules - MIXED
Unit costs & Budget based
.....(80%)

ELIGIBLE COSTS - SPORT projects
SMALL COLLABORATIVE PARTNERSHIP

1. Project management and implementation
€ 500/€250 per month

2. Transnational project meetings
max. € 23.000/year
based on distances€ 575 - €760)

3. Exceptional costs
budget based 80%, max. € 10.000 for subcontracting
or purchase of goods&services

Maximum grant: € 60.000 for total project duration.

Duration of project: 12, 18 or 24 months





THE FUNDING RULES IN YOUR SCHOOL'S PROJECT #2

Budgeting with
Budget-based
Real Costs
rules



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Erasmus Guide EN 2017
Page 235 Sport & Parl C, page 244



ELIGIBLE COSTS – WHAT DOES IT MEAN?



➤ Reimbursement of a specific proportion of costs actually incurred by the beneficiary.

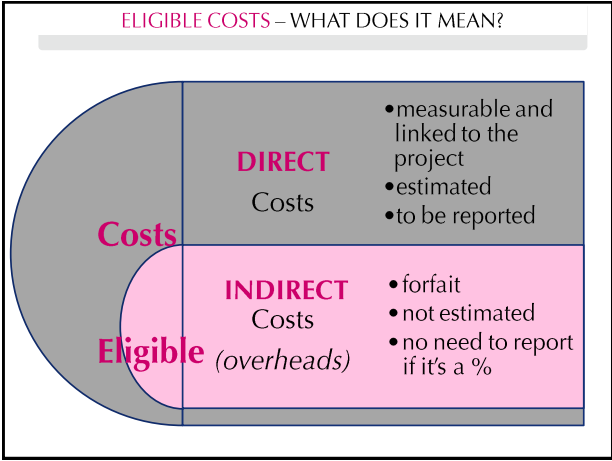
➤ It is an estimate of the project's expenses and the basis to calculate the EU grant.

➤ It is expressed as a specific amount (maximum financing) and a percentage.

Financing mechanism	Amount	Rule of allocation
Real costs	Maximum grant awarded: 60 000 EUR Maximum 80% of the total eligible costs.	Conditional: the budget requested is justified in relation to the planned activities.



7





ELIGIBLE COSTS – SIX CRITERIA FOR ELIGIBILITY #1

1. they are incurred **during the lifetime of the project**, with the exception of costs relating to final reports and audit certificates.

Duration of project	12, 18 or 24 months
---------------------	---------------------

When to apply?	Foaplicants have to submit their grant application by 12 May at 12:00 (midday Brussels time) for projects starting on 1 January of the following year.
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2. they are indicated in the **estimated overall budget** of the project.




ELIGIBLE COSTS – SIX CRITERIA FOR ELIGIBILITY #2

3. they are **necessary** for the implementation of the project which is the subject of the grant.

Role of allocation	<p>WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?</p> <p>Erasmus+ offers a large flexibility in terms of activities that Small Collaborative Partnerships can implement, as long as a proposal demonstrates that these activities are the most appropriate to reach the objectives defined for the project. Small Collaborative Partnerships may typically cover a broad range of activities, such as for example:</p> <ul style="list-style-type: none">• networking among stakeholders;• promotion, identification and sharing of good practices;• preparation, development and implementation of educational and training modules and tools;• awareness-raising activities on the added value of sport and physical activity in relation to the personal, social and professional development of individuals;• activities to promote innovative synergies between the field of sport and the fields of health, education, training and youth;• activities to improve the evidence-base of sport to tackle societal and economic challenges (collection of data underpinning the aforementioned activities, surveys, consultations, etc.);• conferences, seminars, meetings, events and awareness-raising actions underpinning the aforementioned activities.
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Conditional: the budget requested is justified in relation to the planned activities.

4. they are **identifiable and verifiable**, in particular being **recorded** in the accounting records of the beneficiary and determined according to the applicable accounting standards of the country where the beneficiary is established and according to **the usual cost accounting practices** of the beneficiary;



ELIGIBLE COSTS – SIX CRITERIA FOR ELIGIBILITY #3

A few words about point 4: ...**identifiable and verifiable**, in particular being **recorded** in the accounting records.
Do not take it as an example! ☺



ELIGIBLE COSTS – SIX CRITERIA FOR ELIGIBILITY #4

- 5. they comply with the requirements of applicable **tax and social legislation** (e.g. VAT, social security treatment etc)
- 6. they are **reasonable, justified**, and comply with the principle of **sound financial management**, in particular regarding economy and efficiency.



...to avoid money loss

- ✓ Match correctly your estimated costs and expected achievements to prove your project's sound financial management;
- ✓ Justify the resources used to attain the objectives;
- ✓ Pay attention to coherence between the technical description (report) in the Mobility Tool and your payment request.




INELIGIBLE COSTS


- return on capital;
- debt and debt service charges;
- provisions for losses or debts;
- interest owed;
- doubtful debts;
- exchange losses;
- VAT, when it is considered as recoverable under the applicable national VAT legislation;
- costs declared by the beneficiary and covered by another project or work programme receiving an EU grant;
- excessive or reckless expenditure;
- in the case of renting or leasing of equipment, the cost of any buy-out option at the end of the lease or rental period;
- costs of opening and operating bank accounts (including costs of transfers from/to the National or Executive Agency charged by the bank of the beneficiary).




OTHER WORDS ON INELIGIBLE COSTS



- Contributions in kind





- Expenses linked to the participation of EC staff




FUND MANAGEMENT - KA2 SCHOOL-TO-SCHOOL

NA PL







School
Main Benef.




NA IT







School 2

NA Others









School 3




FUND MANAGEMENT - KA2 "normal"









PARTNER 1




PARTNER 2




PARTNER 3



PARTNER 4






CONTRACTUAL PROCEDURES



MY APPLICATION IS **APPROVED?**
....AND **NOW?**

1. **Grant decision** – unilateral act – is notified to the applicant. Upon receipt/notification of the decision, the applicant becomes the beneficiary of an EU grant and can start the project;
2. **Grant Agreement** – bilateral act – establishing the legal relationship between the NA (KA1, KA2) or EA (sport), on one side, and one or several beneficiaries, on the other side.
 - **Mono-beneficiary** agreement (one beneficiary)
 - **Multi-beneficiary** agreement (one coordinator + partners signing mandates)





PROJECT LIFE-CYCLE AND PAYMENTS #1


Project type	Project life-cycle deadlines			Payments		
	Award decision	Grant agreement signature	Final payment	N. of pre-fin.	Interim report	Payments
KA1	4 months from the submission deadline	4 months from the submission deadline	Within 60 calendar days from the receipt of the final report by NA	1	No	Prefin: 80% Balance: 20%
KA2 Up to 2 years	4 months from the submission deadline	5 months from the submission deadline	Within 60 calendar days from the receipt of the final report by NA	1	Yes	Prefin: 80% Balance: 20%




PROJECT LIFE-CYCLE AND PAYMENTS #2

Project type	Project life-cycle deadlines			Payments		
	Award decision	Grant agreement signature	Final payment	N. of pre-fin.	Interim report	Payments
KA2 2-3 years	4 months from the submission deadline	5 months from the submission deadline	Within 60 calendar days from the receipt of the final report by NA	2	Yes	Prefin: 40%+40% Balance: 20%
SPORT Small	5 months from the submission deadline	6 months from the submission deadline	Within 60 days from the receipt of the final report by EACEA	1	No	Prefin: 70% Balance: 30%





END OF DAY 2



REPORTING

Reporting activities in Erasmus Plus and the Mobility Tool

Rome, Italy, 2017

DAY 3





KA1 – FUND MANAGEMENT

1

UNIT COSTS method

Transfer to mobility participant the financial support received for:

- travel
- individual support
- course fee

2

REAL COSTS method


Supply to participant the services linked to travel, individual support and course fees or, in case the participant anticipated the expenses, reimburse the costs incurred according to the school's rules.

3

MIXED method

Combine the two methodologies. For example, travel reimbursed using unit costs method and individual support reimbursed by real costs.

If method 2: report to your NA the expenses actually incurred and keep all accounting documents (travel tickets, invoices, contracts, receipts ...)



KA1 #1 TRAVEL

Basis for calculation:

Distance Calculator of the EU Commission.

http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

Reporting:

Register the activity in the Mobility Tool.

Place of residence of participant = your school's city

Destination = place of receiving organization

In case of travel from a place different than place of residence of the participant and/or travel to a place different than that where the receiving organisation is located which leads to a change of distance band, support the actual travel itinerary with travel tickets or other invoices specifying the place of departure and the place of arrival.

Supporting documents:

Keep travel tickets and boarding cards. In particular, take care of supporting documents in case you choose method 2 of reporting.



KA1 #2 ORGANIZATIONAL SUPPORT

Basis for calculation:

Multiplication of the total number of participations in mobility activities by the unit contribution (€ 350).

What does it mean?

All costs linked to:

- Realization of the mobility activities (e.g linguistic, pedagogical, intercultural preparation of participants and verification of learning results)
- Preparation of European Development Plan
- Organization of the mobility, information and assistance to participants
- Selection of participants
- Monitoring and dissemination/exploitation of results



KA1 #3 INDIVIDUAL SUPPORT

Basis for calculation:

multiplying the number of days/months per participant, including accompanying persons, by the unit contribution applicable per day/month for the receiving country.

Reporting:

Registration of the activities in the Mobility Tool, start and end date of mobility, including travelling days.

Supporting documents:

proof of attendance of the activity abroad in the form of a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the activity abroad, as well as its starting and end date.



Keep all documents if you choose Method 2 for reporting your costs (real costs)!



KA1 #4 COURSE FEES

Basis for calculation:

total number of days per course by the unit contribution
in mobility: € 70/day, max. € 700/partecipant.
Only effective course days.

Reporting:

Registration of the course duration in the Mobility Tool, start and end date.

Supporting documents:

proof of enrolment in the course and of payment of a course fee in the form of an invoice or other declaration issued and signed by the course provider specifying the name of the participant, the name of the course taken as well as the start and end date of the participant's participation in the course.



KA1 #5 SPECIAL NEEDS COSTS

Basis for calculation:

Real costs actually incurred. These are reimbursed 100% but you need to justify costs, needs and amounts.

Supporting documents:

Keep all accounting documents: invoices, receipts, contracts etc.

KA1 #6 EXCEPTIONAL COSTS

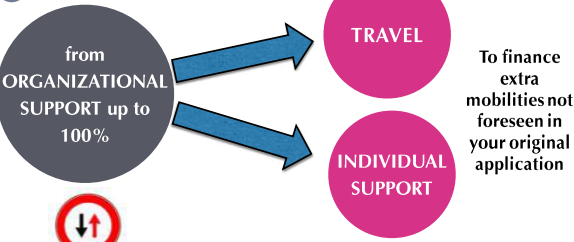
Basis for calculation:

Real costs actually incurred. Real costs actually incurred. These are reimbursed 75% but you need to justify costs, needs and amounts.



KA1 – BUDGET TRANSFERS

1



Pay attention:
You cannot transfer 10 organizational support!



KA1 – BUDGET TRANSFERS


2

From ANY budget line

➔


SPECIAL NEEDS SUPPORT


Even if **no initial funds** were allocated



Let's **REFRESH** our MEMORIES- KA2 COSTS

- Project management and implementation
- Transnational project meetings
- Exceptional costs
- Special needs support
- Intellectual outputs
- Multiplier events
- Training, teaching, learning activities
 - travel
 - individual support
- Linguistic support
- Exceptional costs – expensive travel to outermost regions






KA2 - **PROJECT MANAGEMENT AND IMPLEMENTATION**

Basis for calculation:
Duration of project in months multiplied by unit costs.
E.g. Project management (planning, finances, coordination and communication between partners, etc.); small scale learning/teaching/training materials, tools, approaches. Virtual cooperation and local project activities (class-room project work with learners. Information, promotion, dissemination (brochures, leaflets, web information).

Triggering event:
you implement the activities and produce the outputs to be covered from this budget category as in your application form.

Supporting documents:
Description in the final report of activities undertaken and output produced.



KA2 - **TRANSNATIONAL PROJECT MEETINGS**

Basis for calculation:

Multiplication of the total number of participants with the unit costs.
Remember limits: max. € 23.000/year)

Triggering event:

the participant has actually participated in the transnational project meeting and undertaken the reported travel.

Supporting documents:

For travel between the sending and the receiving organisation: proof of attendance of the activity abroad in the form of a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the activity abroad, as well as its starting and end date.

In case of travel from a place different than that where the sending organisation is located and/or travel to a place different than that where the receiving organisation is located, keep travel tickets or other invoices specifying the place of departure and the place of arrival.



KA2 - **INTELLECTUAL OUTPUTS**

Basis for calculation:

Multiplication of the number of days of work performed by the staff by the unit contribution applicable per day for the category of staff for the country in which the beneficiary concerned is established.

Triggering event:

the intellectual output has been produced and is of an acceptable quality level, as determined by the evaluation of the NA.

Supporting documents:

Description of the output in the Dissemination Platform
Time Sheet for the staff
Employment Contract or voluntary work contract with staff.



KA2 - **MULTIPLIER EVENTS**

Basis for calculation:

Multiplication of the number of participants from organisations (other than the beneficiary and other project partner organisations) by the unit costs.

Triggering event:

the multiplier event has taken place and is of an acceptable quality level, as determined by the evaluation of the NA.

Supporting documents:

- Description of the output in the final report
- Participant list with name, date and place of the event, and for each participant: name, e-mail address and signature of the person;
- Detailed agenda and any document used or distributed at the multiplier event.



KA2 - TRAINING, TEACHING, LEARNING ACTIVITIES

Basis for calculation:

Travel: n° of participants and distance band

Individual support: n° of participants by days of mobility

Linguistic support: n° of participants by unit costs € 150

Triggering event:

the participant has actually undertaken the reported travel, the activity abroad, and, if entitled to the language preparation.

Supporting documents:

- declaration by receiving organization
- travel tickets
- invoice for purchase of learning material, language taught, duration of linguistic support



KA2 - EXCEPTIONAL COSTS

Basis for calculation:

The LOWEST ceiling calculated between:

-the reimbursement of 75% of costs actually incurred

or

- the maximum € 50.000 (excluding the eventual financial guarantee).



Subcontracting cannot be provided by your project partner!

Supporting documents:

Subcontracting: invoices of the actual costs incurred

Financial guarantee: proof of costs/contracts

Depreciation costs: proof of purchase, leasing, rental



KA2 - SPECIAL NEEDS SUPPORT

Basis for calculation:

Reimbursement of 100% of the eligible costs actually incurred.

Eligible costs:

costs that are indispensable to allow persons with disabilities to participate in the Project and that are additional to costs supported by a unit contribution

Supporting documents:

invoices of the actual costs incurred, specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice.



KA2 – BUDGET TRANSFERS #1

- Up to 20% of the funds allocated for:
- Project management and implementation,
 - Transnational Project Meetings,
 - Intellectual Outputs,
 - Multiplier Events,
 - Learning/teaching/training activities
 - Exceptional costs

TO any other budget category with the exception of the budget allocated for Project management and implementation costs and Exceptional costs.

Any budget transfer shall result in an increase of maximum 20% of the amount awarded to that budget category.



KA2 – BUDGET TRANSFERS #2

You can transfer funds allocated for any budget category TO Special needs support, even if no funds are allocated for this budget line. The maximum increase of 20% of the budget category Special needs support do not apply.

You can transfer funds allocated for any budget category except Special needs support TO the budget category Exceptional costs in order to contribute to the costs of a financial guarantee, if the NA requires it (even if no funds are allocated for Exceptional costs for the guarantee). The maximum increase of 20% of the budget category Exceptional costs do not apply



KA2 – BUDGET TRANSFERS #3

General Rules

E

The budget transfers cannot be done for those budget categories for which no funds were requested during the application ("zero cost budget lines")

except for Special needs support and Exceptional costs (to cover financial guarantee, see. Point D)

General Rules

F

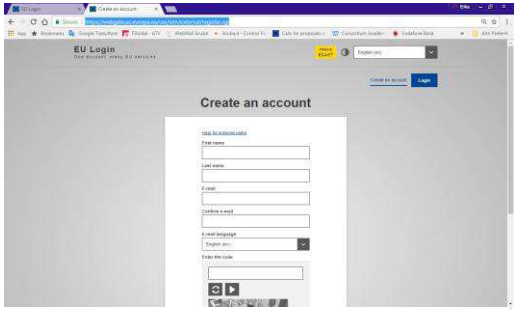
The budget transfer may not have the purpose or the effect of making changes to the Agreement which would call into question the decision awarding the grant or be contrary to the equal treatment of applicants.



REPORTING OF KA1 and KA2 projects

The Mobility-Tool

1. Access to the web platform via your ECAS password (EU LOGIN): <https://webgate.ec.europa.eu/eac/mobility>

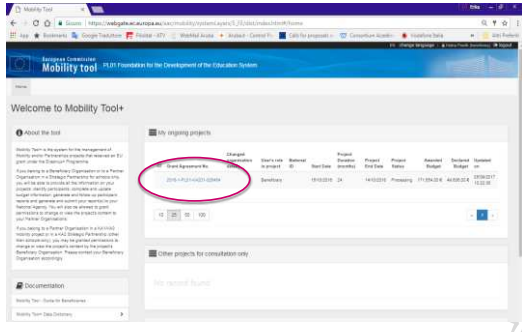




REPORTING OF KA1 and KA2 projects

The Mobility-Tool

2. Choose your project

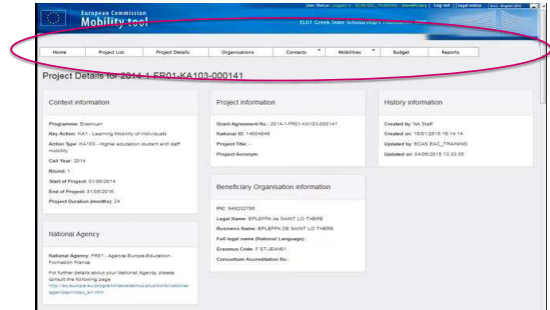




REPORTING OF KA1 and KA2 projects

The Mobility-Tool

3. General Project data and budget lines (KA1)





19

REPORTING OF KA1 and KA2 projects

The Mobility-Tool

3b. General project data and budget lines (KA2)

Project 2016-1-PL1-KA2-0204

Home

Organisations

Contacts

Project Management and Implementation

Translation Project Budgeting

Financial Details

Mobile Events

Learning, Teaching and Training Activities

Home

Organisations

Contacts

Project Management and Implementation

Translation Project Budgeting

Financial Details

Mobile Events

Learning, Teaching and Training Activities

Project Details

Project Information

Project Accounts

Beneficiary Organisation Information

History Information

Project Details

Project Information

Project Accounts

Beneficiary Organisation Information

History Information

Project Details

Project Information

Project Accounts

Beneficiary Organisation Information

History Information

REPORTING OF KA1 and KA2 projects

The Mobility-Tool

4. Check your data in the menu screens

Home and Project List – redirects to the main page of the tool that shows the list of projects

Organisations – shows a list of organisations taking part in the project, including the beneficiary, sending, receiving or other type of organisations

Contacts – shows a list of contacts for organisations

Mobilities – shows a list of mobilities with participant details

Budget – shows a project's budget summary

Reports – provides facility for final report to National Agency

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REPORTING OF KA1 and KA2 projects

5. Force Major in case of Mobility Activities

Force majeure applies to KA2 Learning, Teaching and Training Activities which due to an unforeseeable exceptional situation or event beyond the individual participant's control, could not be started or completed.

These situations can arise at any time including factors such as sudden disease, accidents, death, earthquakes and other causes beyond the control of the participant.

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20

REPORTING of **SPORT projects** - SMALL COLLABORATIVE PARTNERSHIP

- Use appropriate reporting **templates** and financial tables provided on the Agency's website.
- Write the report in one of the **official working languages** of the EU (English, French or German).
- Do not use the report as a means to signal major changes. These are subject to formal **amendment** requests that should be submitted separately, at any event, within a minimum of 30 days before the end of the eligibility period.





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THANK
YOU
FOR
PARTICIPATING