

Project Management Webinar

Key Action 1 – Vocational Education and Training (KA102 and KA116)

1 October 2020

Agenda

2 - 4pm Introduction

Summary of the grant agreement

Financial Input including:

- * eligible costs,
- * evidence required,
- * budget transfers
- * types of checks

Q & A (via Chat)



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Housekeeping

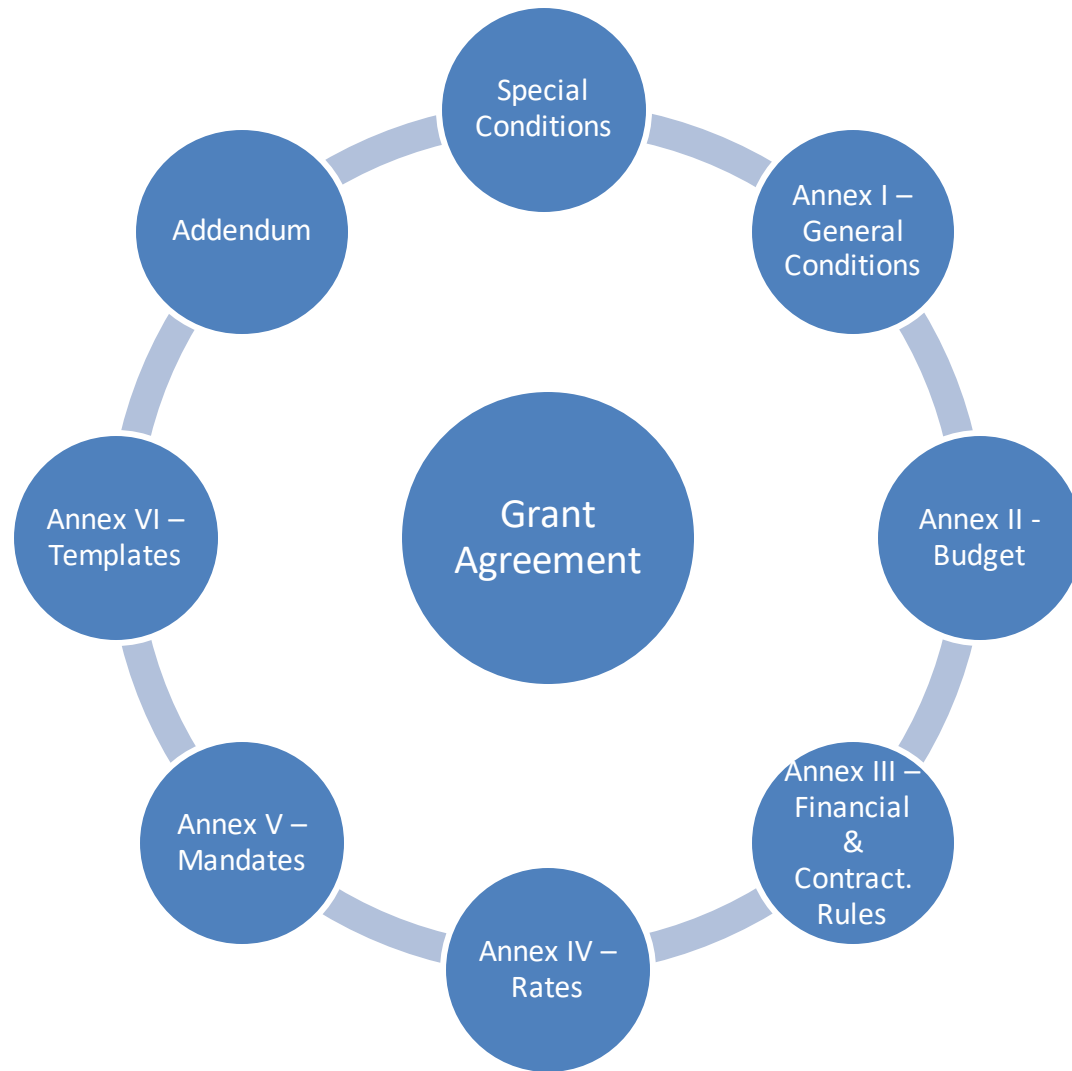
**This event will be a recorded event.
We kindly ask that you:**

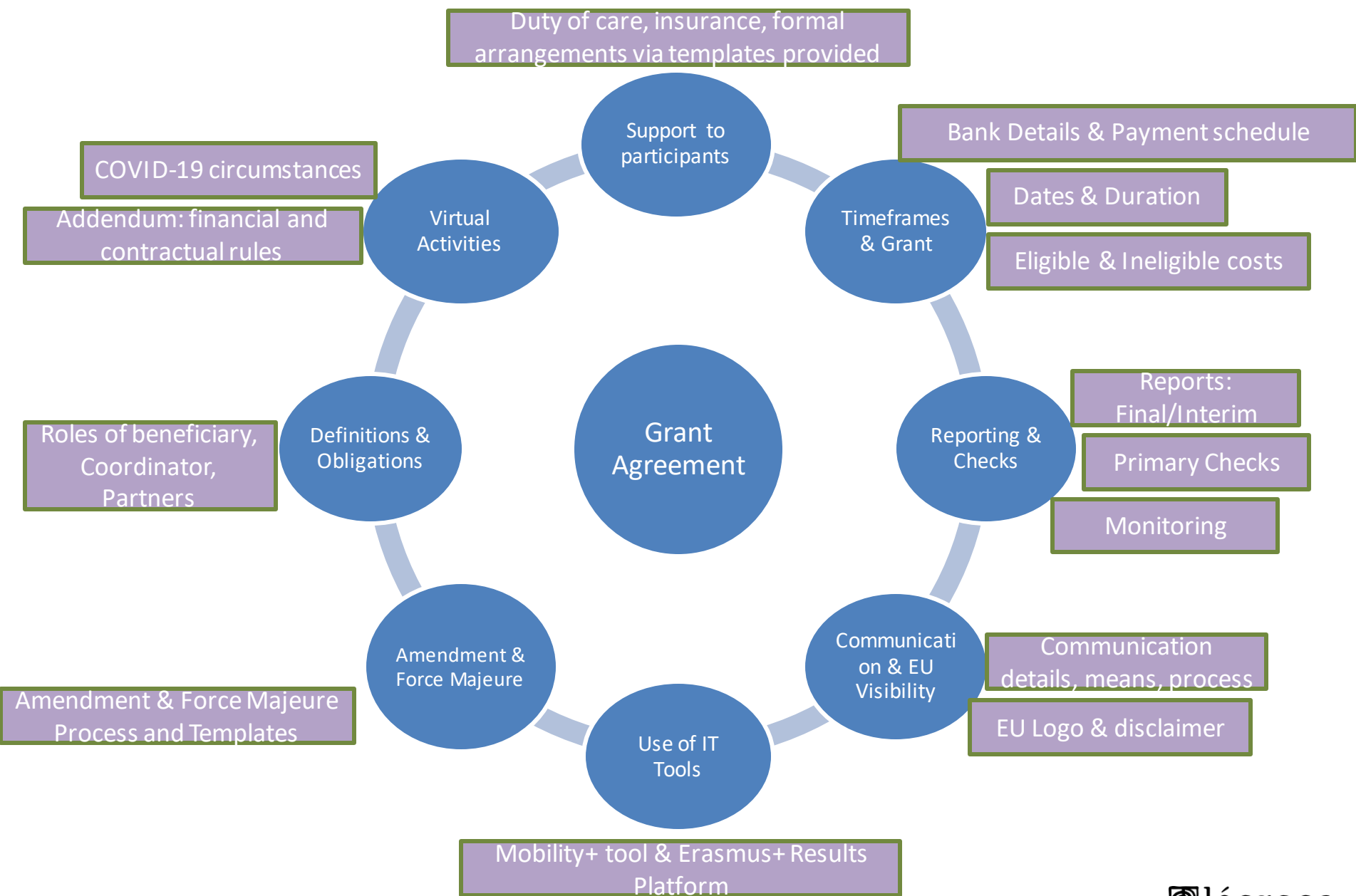
- Turn off your camera
- Mute your microphones
- Write all questions you may have in the chat

We will answer all the questions at the end of the session.



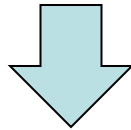
Grant Agreement





Financial Provisions – Co-financing

- **All Erasmus+ projects are expected to be co-financed:**
 - Erasmus+ grant will not / might not cover all costs
 - The grant is intended to be a contribution towards the costs of project implementation and mobility activities

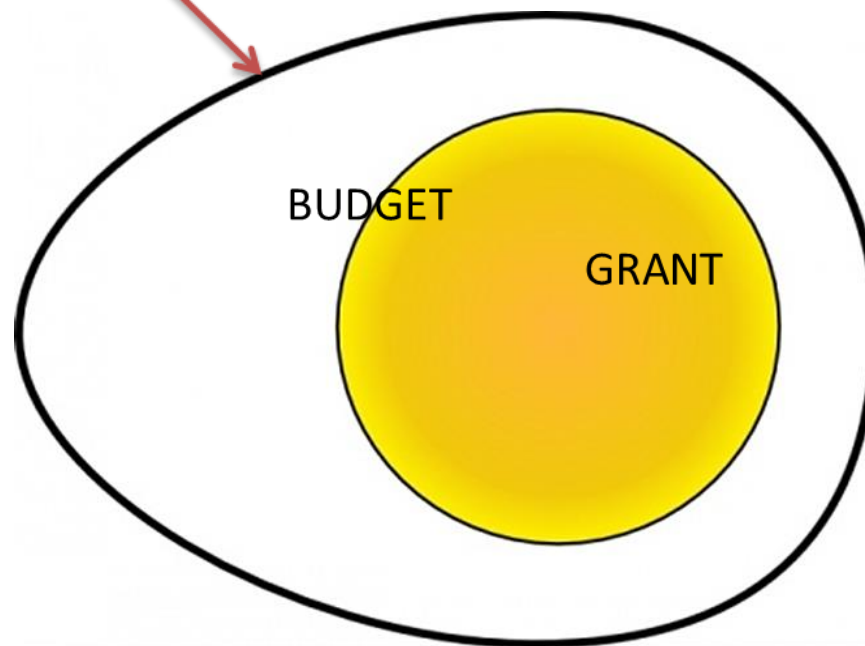


grant calculation in the application \neq total project cost

- **Erasmus+ grant:**
 - Should be used to deliver projects
 - **Cannot** fund the running of an organisation

Financial Provisions – Co-financing

Beneficiary's Budget:
Own funding (white)
Grant (yolk)



Important Documents

- Erasmus+ Programme Guide 2020
- Project's Grant Agreement
 - Part B. of Annex II – General Conditions
 - Annex III – Financial and Contractual Rules
 - Annex IV – Applicable Rates
 - Addendum to the grant agreement

Eligibility of Expenses – Eligible Costs

- Incurred by the beneficiary and relevant eligible participants
- Incurred during the project lifetime
- Indicated in Annex II (or eligible following budget transfers)
- Necessary for the project implementation
- Identifiable and verifiable = supported by relevant documentation

Budget Categories

Travel	UNIT COSTS
Individual Support	
Organisational Support	
Linguistic Support	

Special Needs Support	REAL (ACTUAL) COSTS
Exceptional Costs	

Annex III – Financial and Contractual Rules for physical activities

Annex III – physical activities

Travel	
Eligible Costs	<ul style="list-style-type: none">• Based on the distance per participant from the place of origin to the place of the host venue.• Place of origin: where the sending organisation is located.• Place of the venue: where the receiving organisation is located.• Travel funding will not apply if:<ul style="list-style-type: none">✓ Travel did not take place✓ Travel was funded from other EU sources including other E+ activities
Financing Mechanism	<p>Based on unit costs:</p> <ul style="list-style-type: none">• On-line distance calculator to be used for the establishment of the applicable distance band (http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm).• A list of unit costs per distance band is included in Annex IV to your grant agreement.

Annex III – physical activities

Travel continued

Triggering Event

- Participant has actually undertaken the activity abroad

Supporting Docs for NA

- Proof of attendance of the activity abroad in the form of a declaration signed by the receiving organisation and including:
 - name of the participant
 - the purpose of the activity abroad
 - its starting and end date (excluding travel days)

If a different place of origin or venue is reported, the beneficiary must provide the reason for this difference. It is best practice to keep all travel evidence including travel tickets, receipts, etc.).

Best Practice

- **Keep evidence of all costs incurred (e.g. invoices, receipts, etc)**

Annex III

Travel continued

Reporting

In case of APV to hosting Partners where no ErasmusPro activities were organised as a result, the beneficiary shall submit a justification to the NA explaining the reasons for not implementing ErasmusPro activities with this particular hosting Partner.

- Such explanation might be accepted and, as a result, APV approved by the NA (as derogation from Art. III or Annex III) even though relevant ErasmusPro activities did not happen.
- Reviewed on a case by case basis.

Annex III

Individual Support

Eligible Costs

- Costs directly linked to the subsistence of participants during the activity (this includes accompanying persons).

Financing Mechanism

Based on **unit costs and dependant on duration of the stay and receiving country:**

- Includes 1 travel day before and 1 travel day following the activity
- The grant amount is calculated by multiplying the number of days per participant with the unit contribution (unit cost) applicable per day for the receiving country concerned as specified in Annex IV of the grant agreement.

Annex III

Individual Support Continued

Triggering Event	<ul style="list-style-type: none"> Participant has actually undertaken the activity abroad for a specified period
Supporting Docs for NA	<ul style="list-style-type: none"> Proof of attendance of the activity abroad in the form of a declaration signed by the receiving organisation and including: <ul style="list-style-type: none"> name of the participant the purpose of the activity abroad its starting and end date On-line questionnaire completed by individual participants (automatic function available during input of data into Mobility+ Tool)
Please note	<ul style="list-style-type: none"> Periods of interruptions during the stay – not counted for Individual support Termination by the participant of the agreement with the beneficiary due to force majeure – participant is entitled to amount corresponding to the actual duration of the stay (unless otherwise agreed) Suspension by the participant of the grant agreement with the beneficiary due to force majeure – participant is entitled to continue mobility after interruption (mobility end date cannot exceed the end date of the project)
Best Practice	<ul style="list-style-type: none"> Keep evidence of all costs incurred (e.g. invoices, receipts, etc.)

Annex III

Individual Support Continued

Reporting

In case of APV to hosting Partners where no ErasmusPro activities were organised as a result, the beneficiary shall submit a justification to the NA explaining the reasons for not implementing ErasmusPro activities with this particular hosting Partner.

- Such explanation might be accepted and, as a result, APV approved by the NA (as derogation from Art. III or Annex III) even though relevant ErasmusPro activities did not happen.
- Reviewed on a case by case basis.

Annex III

Organisational Support

Eligible Costs	<ul style="list-style-type: none">Any costs directly linked to the implementation of mobility activities (excluding subsistence for participants) preparation (pedagogical, intercultural, linguistic), monitoring and support of participants during mobility, validation of learning outcomes, dissemination activities.
Financing Mechanism	<p>Based on the number of participants (excluding accompanying persons):</p> <ul style="list-style-type: none">€350 per participant for up to 100 participants€200 for any additional participants (above 100 participants)
Triggering Event	<ul style="list-style-type: none">Participant has actually undertaken the activity abroad.
Supporting Docs for NA	<ul style="list-style-type: none">Proof of attendance of the activity abroad in the form of a declaration signed by the receiving organisation and including:<ul style="list-style-type: none">name of the participantthe purpose of the activity abroadits starting and end date
Best Practice	<ul style="list-style-type: none">Keep evidence of all costs incurred (e.g. invoices, receipts, etc.)

Annex III

Organisational Support

Eligible Costs	<ul style="list-style-type: none">Any costs directly linked to the implementation of mobility activities (excluding subsistence for participants) preparation (pedagogical, intercultural, linguistic), monitoring and support of participants during mobility, validation of learning outcomes, dissemination activities.
Financing Mechanism	<p>Based on the number of participants (excluding accompanying persons):</p> <ul style="list-style-type: none">€350 per participant for up to 100 participants€200 for any additional participants (above 100 participants)
Triggering Event	<ul style="list-style-type: none">Participant has actually undertaken the activity abroad.
Supporting Docs for NA	<ul style="list-style-type: none">Proof of attendance of the activity abroad in the form of a declaration signed by the receiving organisation and including:<ul style="list-style-type: none">name of the participantthe purpose of the activity abroadits starting and end date
Best Practice	<ul style="list-style-type: none">Keep evidence of all costs incurred (e.g. invoices, receipts, etc.)

Annex III

Online Linguistic Support (OLS)

Eligible Languages

- Applicable for mobilities for which the main languages of instruction/work is Bulgarian, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Italian, Latvian, Lithuanian, Polish, Portuguese, Romanian, Slovak, Slovenian, Spanish or Swedish (or additional languages once they become available in the Online Linguistic Support (OLS) tool), with the exception of native speakers.

OLS language assessments licenses

- Provided for participants of mobilities at least 19 days long (excl. travel) from sending organisations
- First OLS assessment to be taken before the mobility period
- Second OLS assessment to be taken at the end of mobility period

Annex III

Online Linguistic Support (OLS)

OLS language courses

- Only applicable if participants took an OLS assessment
- Awarded according to participant's linguistic needs
- Mobility participants with a level of B2 or higher at the first OLS assessment can follow an OLS language course in either the language of instruction/work or in the local language of the country (if available in OLS)
- Timing: used in the period between the first and second OLS assessment, before and during the mobility

Beneficiary's role:

- Monitoring of use of licenses
- Ensure active use of licenses
- Specify the use of OLS language assessment and courses in participants' individual mobility grant agreements
- Reporting on the number of used language assessments and language course licenses

Annex III

Linguistic support (only for languages not covered by OLS)

Eligible Costs	<ul style="list-style-type: none">Costs directly linked to the support offered to participants– prior to departure or during the activity – in order to improve the knowledge of the language they will use to study or receive training during their activity.
Financing Mechanism	<p>Based on unit costs:</p> <ul style="list-style-type: none">The grant amount is calculated by multiplying the total number of days per course with the unit contribution applicable as specified in Annex III of the Agreement. (€70 per participant per day and maximum of €700 per participant in the mobility project).

Annex III

Linguistic support (only for languages not covered by OLS) continued

Triggering Event	<ul style="list-style-type: none">The participant has actually undertaken language preparation in the language of instruction of work abroad.
Supporting Docs for NA	<ul style="list-style-type: none">Proof of attendance of courses in the form of a declaration signed by the course provider, specifying the name of the participant, the language taught, the format and duration of the linguistic support provided, orInvoice for the purchase of learning materials, specifying the language concerned, the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice, orIn case the linguistic support is provided directly by the beneficiary: a declaration signed and dated by the participant, specifying the name of the participant, the language taught, the format and duration of the linguistic support received.
Best Practice	<ul style="list-style-type: none">Keep evidence of all costs incurred (e.g. invoices, receipts, etc.)

Annex III

Special Needs Support

Eligible Costs	<ul style="list-style-type: none"> Additional costs directly related to participants with special needs and accompanying persons (including costs related to travel and subsistence, if justified) and as long as they are not requested through budget categories "travel" and "individual support".
Financing Mechanism	<ul style="list-style-type: none"> Calculation of the grant amount: the grant is a reimbursement of 100% of the eligible costs actually incurred
Triggering Event	<ul style="list-style-type: none"> Participants with special needs took part in the project.
Supporting Docs for NA	<ul style="list-style-type: none"> Invoices for related costs incurred specifying: <ul style="list-style-type: none"> ✓ the name and address of the body issuing the invoice, ✓ the amount and currency, ✓ the date of the invoice. <i>* proof of payment might be also requested</i>
Best Practice	<ul style="list-style-type: none"> Keep evidence of all costs incurred (e.g. invoices, receipts, etc.)

Annex III

Exceptional Costs – Expensive Travel Costs

Eligible Costs	<ul style="list-style-type: none">Costs of travel in the most economical but also effective way for eligible participants for which the standard funding rule does not cover at least 70% of the eligible costs.The exceptional costs for expensive travel replace the standard travel grant.
Financing Mechanism	<ul style="list-style-type: none">80% of the eligible costs for expensive travel costs of eligible participants.
Triggering Event	<ul style="list-style-type: none">Travel of participants took place.
Supporting Docs for NA	<ul style="list-style-type: none">Proof of payment of the related costs on the basis of invoices specifying:<ul style="list-style-type: none">✓ the name and address of the body issuing the invoice,✓ the amount and currency,✓ the date of the invoice,✓ travel route.
Best Practice	<ul style="list-style-type: none">Keep evidence of all costs incurred (e.g. invoices, receipts, etc.)

Annex III

Exceptional Costs

Eligible Costs	<ul style="list-style-type: none">Costs that are indispensable to allow learners with fewer opportunities to participate in the project (excl. costs for travel and individual support for participants and accompanying persons)
Financing Mechanism	<ul style="list-style-type: none">Calculation of the grant amount: the grant is a reimbursement of 100% of the eligible costs actually incurred
Triggering Event	<ul style="list-style-type: none">Actual costs have been incurred.
Supporting Docs for NA	<ul style="list-style-type: none">Participation of learners with fewer opportunities: 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.<i>* proof of payment might be also requested</i>
Best Practice	<ul style="list-style-type: none">Keep evidence of all costs incurred (e.g. invoices, receipts, etc.)

Budget Transfers

Article I.3.2 of your Grant Agreement

Changes without amendment to the contract:

Transfers are possible to **increase** participation and mobilities.

- Funds allocated to Organisational Support cannot be increased
- A maximum of 20% of the total funds initially allocated for ErasmusPro activities (Organisational Support, Travel and Individual Support, including funds allocated to Advance Planning Visits) may be transferred to other types of activities.
- The total funds initially allocated for ErasmusPro APV (Travel and Individual Support) may be increased by a maximum of 20%
- The total funds initially allocated for staff mobility (Travel and Individual Support) may be increased by a maximum of 20%
- Funds allocated for Special Needs Support and Exceptional Costs for support to learners with fewer opportunities may not be transferred to another budget category

All potential changes need to be communicated to the NA first 😊

Types of checks

Desk Check

- In depth check of project's supporting documentation
- At or after the final report stage

On the Spot Check During

- Performed during the project
- Aim: to verify the reality and eligibility of all project activities and participants
- Check on original supporting documentation for the project
- On beneficiary's premises or premises relevant to the project activities
- Access to recording of project expense in beneficiary's accounts

System Checks

- Aim: to establish the beneficiary's compliance with the implementation standards committed to in the framework of the Erasmus+ Programme, including the VET Mobility Charter.
- Aim: to verify the reality and eligibility of all project activities and participants through check of all project documentation, financial evidence, quality evidence and access to beneficiary's accounts.

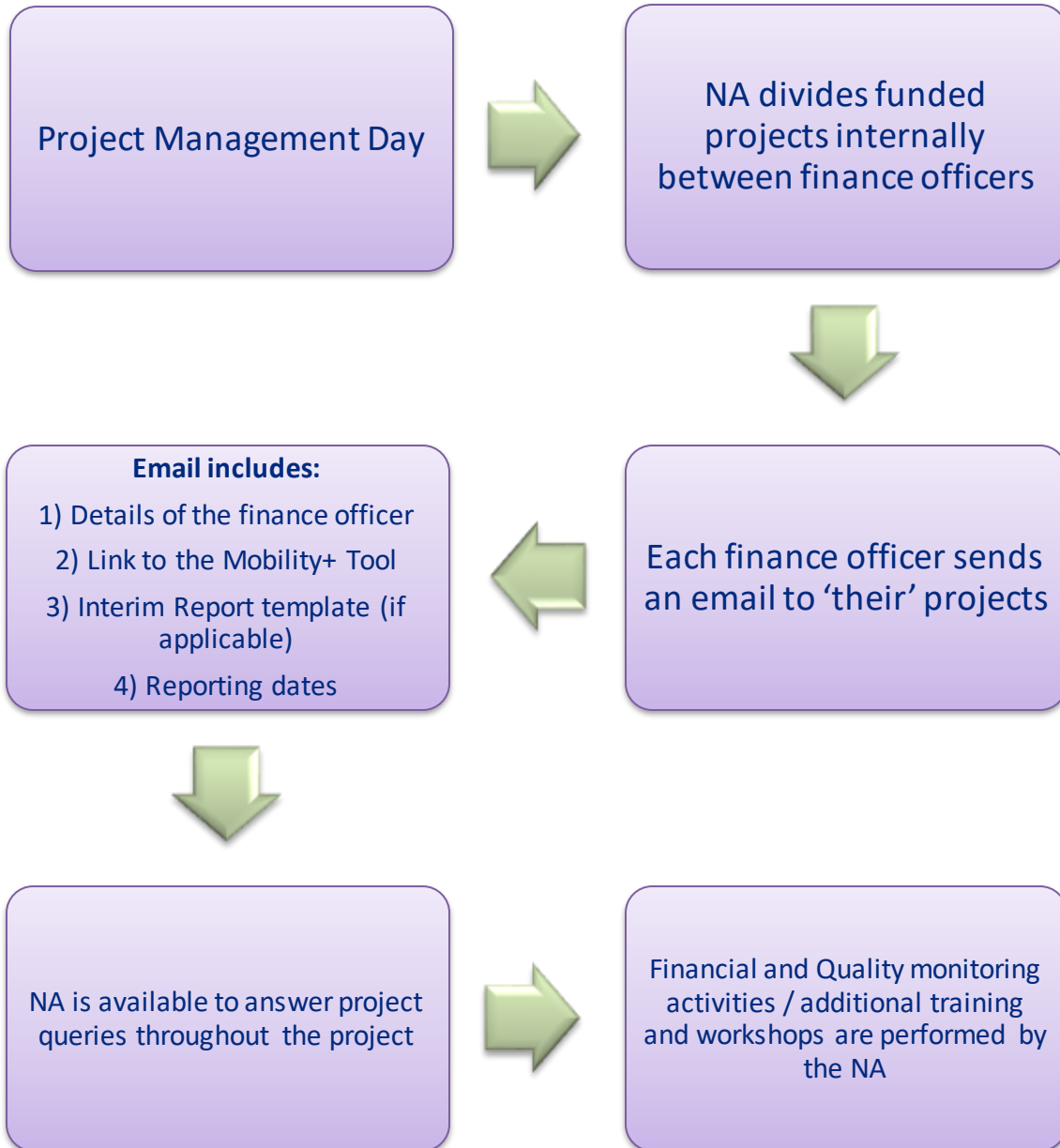
Financial Management

Suggestions for Good Financial Management



- Use a project specific Euro bank account
- Outline financial arrangements in learning agreements between participants and your organisations
- Appoint a Financial Officer
- Develop/ maintain internal financial monitoring systems
- Maintain all financial records and audit trail
- Contact your Project Officer/ Financial Officer if in doubt.

NA Management



BLENDED/VIRTUAL ACTIVITIES IN MOBILITY PROJECTS - BACKGROUND

- COVID-19 pandemic created exceptional circumstances for beneficiaries of Erasmus+ Programme including projects funded under KA1 Mobility of Individuals strand
- The Commission recognised significant barriers in delivery of project activities during COVID-19 pandemic and proposed flexible measures to assist beneficiaries

MEASURES PROPOSED

Delaying
planned physical
activities

Extending
project's
duration

Carry out
planned physical
activities as
blended/virtual
activities

DELAYING PLANNED PHYSICAL ACTIVITIES

Suitable for
projects which
started recently

Activities are
deferred to a
later stage in the
project

Deferred
activities are
expected to be
physical

EXTENDING PROJECT DURATION

All KA1 projects can extend their duration by **UP TO** 12 months

The length of extension will depend on project's original duration and project's original end date

Extension will require a formal amendment to the grant agreement

If you wish to apply for an extension due to COVID-19 follow the steps outlined on our website:

<https://www.leargas.ie/covid-19/>

Physical activities are expected during the extension period (this will however depend on the COVID-19 situation)

CARRYING OUT VIRTUAL ACTIVITIES

Condition: if it is not possible or suitable to postpone the planned physical activities to a later period within the permitted project duration

Virtual activities are only possible in the context of COVID-19

This guidance applies to any new mobility activities going forward that are delivered virtually.

Virtual Activities Outline Form was distributed to all live KA1 projects 2018-2019

Requests for virtual activities will be reviewed on a case by case basis

TRAVEL, INDIVIDUAL SUPPORT AND COURSE FEES IN VIRTUAL ACTIVITIES

Funding not
available

Costs should be
covered through
Organisational
Support funding

Evidence:

- 1) Programme of the virtual activity
- 2) Proof of attendance of the virtual activity in the form of a declaration signed by the receiving organisation and specifying:
 - * the name of the participant,
 - * the purpose of the activity
 - * the start and end date
- 3) Any documentation related to the activity (e.g. presentations, recordings, feedback forms, etc.)

ORGANISATIONAL SUPPORT IN VIRTUAL ACTIVITIES

Funding available
* **CONDITION:**
participant
attended the virtual
activity

Based on the number
of participants
(excluding
accompanying
persons):
* €350 per participant
for up to 100
participants
* €200 for any
additional participants
(above 100
participants)

Evidence:

- 1) Programme of the virtual activity
- 2) Proof of attendance of the virtual activity in the form of a declaration signed by the receiving organisation and specifying:
 - * the name of the participant,
 - * the purpose of the activity
 - * the start and end date
- 3) Any documentation related to the activity (e.g. presentations, recordings, feedback forms, etc.)

SPECIAL NEEDS SUPPORT & EXCEPTIONAL COSTS

VIRTUAL ACTIVITIES

SPECIAL NEEDS SUPPORT: costs directly related to participants with special needs and required to implement virtual activities.

Funding:

Grant reimbursed at 100% of the eligible costs actually incurred

Evidence:

- 1) invoices of the related costs specifying:
 - * the name and address of the body issuing the invoice,
 - * the amount and currency,
 - * the date of the invoice.
- 2) Proof of payment may be requested

SPECIAL NEEDS SUPPORT & EXCEPTIONAL COSTS

VIRTUAL ACTIVITIES

EXCEPTIONAL COSTS:

costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual mobility activities.

Funding:

Grant reimbursed at 75% of the eligible costs actually incurred for buying and/or renting of equipment and/or services

Evidence:

- 1) invoices of the related costs specifying:
 - * the name and address of the body issuing the invoice,
 - * the amount and currency,
 - * the date of the invoice.
- 2) Proof of payment may be requested

BUDGET TRANSFERS WITHOUT A FORMAL AMENDMENT IN VIRTUAL ACTIVITIES

Transfer of UP TO 10% of the funds from any budget category based on unit contributions to exceptional costs in order to cover costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual mobility activities due to COVID-19, even if no funds were initially allocated to the Exceptional costs budget category.

ADDITIONAL RULES

- 1) When possible, a start with a period of virtual mobility, to replace or complement (blended mobility) a physical mobility abroad is encouraged
- 2) Periods of interruption between the virtual and physical mobility periods are allowed
- 3) Once the physical mobility is resumed, the participant is allowed regular grants for the period abroad
- 4) Both periods (virtual and physical) count towards recognition of learning outcomes

CONTRACTUAL DOCUMENTATION / IT TOOLS

VIRTUAL/BLENDED ACTIVITIES

Addendum to the Grant Agreement for KA1 2020 projects issued as an integral part of their contracts

- * additional to art. I.2 and II.2 in original Annex III
- * only applies when virtual activities are organised due to COVID-19

Addendum to the Grant Agreement for current 2018 and 2019 live projects to be issued once the virtual activity is requested and approved

- * additional to art. I.2 and II.2 in original Annex III
- * only applies when virtual activities are organised due to COVID-19

Mobility+ Tool to be updated to accommodate projects organising virtual / blended activities

- *this update is planned for end of September/October

Virtual Activities Outline Form to be issued to beneficiaries on their request



```
graph TD; A[Virtual Activities Outline Form to be issued to beneficiaries on their request] --> B[Beneficiary to complete the form if planning on carrying out / already carried out any project activities virtually and email it to the NA]; B --> C[Each virtual activity request will be reviewed individually, on a case by case basis]; C --> D[Virtual Activities should ONLY be initiated following the approval of the NA];
```

Beneficiary to complete the form if planning on carrying out / already carried out any project activities virtually and email it to the NA

Each virtual activity request will be reviewed individually, on a case by case basis

Virtual Activities should ONLY be initiated following the approval of the NA

GET IN TOUCH



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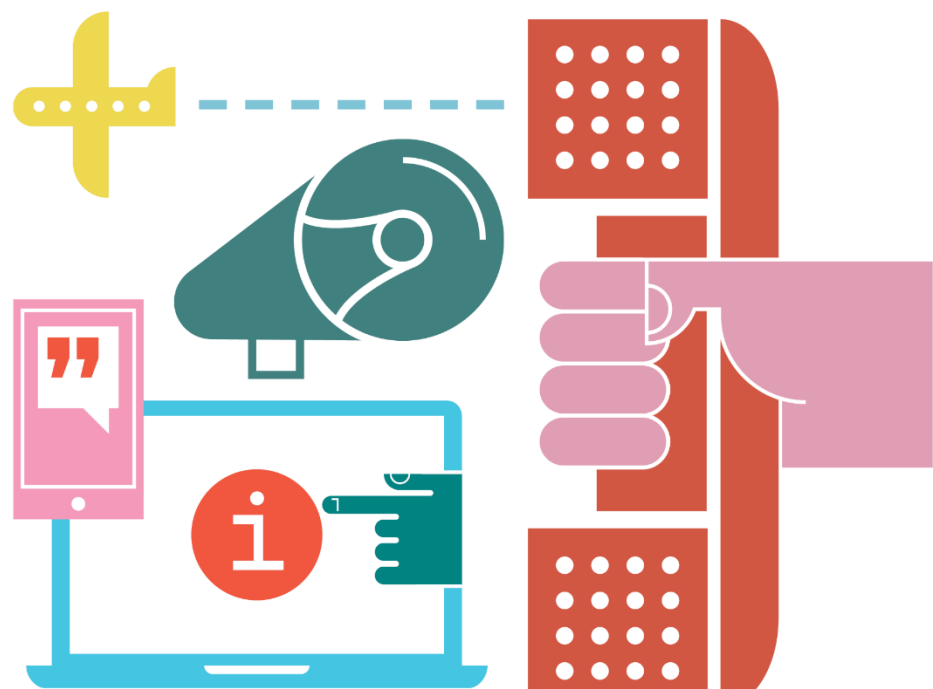
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GET IN TOUCH



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