

2018 Erasmus+ KA1 VET and Adult Education Handbook

Part 3: Resource Pack

Version 1.0

Overview of changes to the handbook

This document is version 1 of the Resource Pack for KA1 VET and Adult Education beneficiaries, which is part three of the KA1 VET and Adult Education Handbook. If future versions of this document 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 |
|---------------------------------|--------|-----------------------------|
| | | |

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Introduction

The 2018 Key Action 1 (KA1) Handbook for Adult Education and Vocational Education and Training (VET) beneficiaries is a guide to help accredited and non-accredited UK beneficiaries with the management of their 2018 KA1 projects. **This guidance is only intended for UK beneficiaries and the UK National Agency (NA) is not accountable for this information being used by other countries.**

The Handbook provides **practical guidance on the various stages of your project lifecycle** and should be used as a reference point for all common project queries. Please note that, while we have tried to cover all main areas of the Project lifecycle and give help on typical queries and issues within this Handbook, the guidance is not exhaustive. It is important to note that this guidance is supplementary to your Grant Agreement and annexes, which you should always refer to first when checking contractual requirements. **We also recommend that you continue to refer to the 2018 Erasmus+ Programme Guide during your project to ensure you are managing your grant in accordance with programme rules.**

The 2018 Erasmus+ KA1 VET and Adult Education Handbook is comprised of three parts that can be downloaded from the [‘manage your grant’](#) section of the Erasmus+ website:

- Part 1: Introduction to Erasmus+ and KA1 VET and Adult Education
- Part 2: Project and Financial Management
- Part 3: Resource Pack

This document is the Resource Pack, which covers information about the templates provided with your Grant Agreement as well as templates for you to use. It is intended to help you manage your project and ensure project activities are supported by the appropriate documents.

Please note that this document may be subject to change throughout the course of the programme. Changes will be recorded on page one of this document, and the most recent version will be found on our [website](#).

Remember, if you have any queries or issues that you cannot find answers to within the Handbook, your Project Officer at the UK NA is on hand to help!

Grant Agreement Templates

Your Grant Agreement included various templates in either Annex V or Annex VI for you to use during your project. These templates are numbered as **Annex V for single beneficiaries** and **Annex VI for consortium projects**. Some of the templates are compulsory and others are just recommended for you to use. You may edit some of the templates to better fit your needs but as a general rule you can only add information to the templates that does not contradict what is already covered. **It is very important that you do not remove any information as these templates have been designed to meet the minimum requirements necessary for your project.** Your agreement will only include the templates that are relevant for your project. If your VET project includes learner and staff mobility (not including accompanying persons) your agreement will include the templates for both types of participants.

The table below shows which templates were included with your Grant Agreement depending on types of mobilities included in your project.

| Adult Education staff mobility | VET staff mobility | VET learner mobility |
|---|---|---|
| <ul style="list-style-type: none"> ▪ Staff Grant Agreement ▪ Mobility Agreement | <ul style="list-style-type: none"> ▪ Staff Grant Agreement ▪ Staff Mobility Agreement ▪ VET Mobility Quality Commitment ▪ ECVET Learning Agreement ▪ ECVET Memorandum of Understanding | <ul style="list-style-type: none"> ▪ Learner Grant Agreement ▪ Learning Agreement ▪ VET Mobility Quality Commitment ▪ ECVET Learning Agreement ▪ ECVET Memorandum of Understanding |

Staff Grant Agreement

Before staff undertake mobility, they must have a grant agreement in place that is signed by themselves and the receiving organisation. This includes key information about their mobility, including the financial support they are entitled to receive based on the unit costs for each budget heading. In the template, some of the text is highlighted in yellow or blue, which means you will need to edit this information. You need to complete text that is **highlighted in yellow** with the correct details

for the mobility of the individual participant. Text that is **highlighted in blue** refers to different options that you can select. You must make sure that the option you choose is appropriate for the participant and delete any you have not selected. You will also need to include the work programme for the mobility as an annex to their grant agreement.

It is compulsory to have a grant agreement for each mobility participant. You can edit the template to better fit the needs of your organisation and project. However, you must not remove any information already included in the template as this is the minimum requirement to include.

Staff Mobility Agreement

The staff mobility agreement supplements the staff grant agreement with a detailed mobility work programme including key competences, support, and evaluation mechanisms. This **must be signed by the participant, the sending organisation, and the receiving organisation**. If you are the coordinator of a consortium, a member of the consortium should sign the mobility agreement, which may mean that the sending organisation for the individual participant may not necessarily be your organisation.

For Adult Education projects, this template is recommended but not compulsory to use. However, **it is compulsory for VET projects**. You can also edit the template but you must not remove any of the information.

Learner Grant Agreement

Before VET learners undertake mobility, they **must have a grant agreement in place that is signed by themselves and the sending organisation**. If you are the coordinator of a consortium, the grant agreement should be signed by the member of the consortium, which is the sending organisation for the individual participant since this may not necessarily be your organisation. The grant agreement includes key information about the mobility, including the financial support the participant is entitled to receive based on the unit costs for each budget heading.

Make sure **you check Article 5 of the Grant Agreement template** to ensure you and your partners are meeting the requirements for insurance coverage for the participants.

In the template, some of the text is highlighted in yellow or blue, which means you, will need to edit this information. You need to complete text that is **highlighted in yellow** with the correct details for the mobility of the individual participant. Text that is **highlighted in blue** refers to different options that you

can select. You must make sure that the option you choose is appropriate for the participant and delete any you have not selected. You will also need to include several documents as annexes to the grant agreement. If your project is using ECVET you should annex the ECVET Learning Agreement, ECVET memorandum of understanding, and the VET quality commitment to the participant's grant agreement. If your project does not use ECVET, you should annex the standard Learning Agreement and the VET quality commitment.

It is compulsory to have a grant agreement for each mobility participant. You can edit the template to better fit the needs of your organisation and project. However, you must not remove any information already included in the template.

Learning Agreement

The **Learning Agreement supplements the Learner Grant Agreement** and should be included as an annex if your project does not use ECVET. The learning agreement should cover the learning outcomes for the participant and how these will be achieved through a detailed mobility work programme with specific tasks, which will be completed. It should also cover the monitoring and support for the participant, the evaluation of the placement, and how the learning outcomes will be recognised. The Learning Agreement must be signed by the participant, the sending organisation, and the receiving organisation. If you are the coordinator of a consortium and acting as an intermediary organisation, the mobility agreement should also be signed by you.

Since the Learning Agreement is an annex for the learner Grant Agreement it is compulsory to use. The template can be edited to better fit the needs of your project but you must not remove any of the information.

VET Mobility Quality Commitment

The Quality Commitment supplements the grant agreement templates for both staff and learners. It is actually an annex for the learner Grant Agreement but only recommended for use for staff participants. The Quality Commitment covers the basic responsibilities for the different roles of the participating organisations in the project as well as the basic responsibilities of the participant. This needs to be signed by each organisation involved in the mobility as well as the participant.

You can use this template as a starting point for creating your own tailored partnership agreements for your project.

For **VET learners this is compulsory** and must be included as an annex with the learner Grant Agreement but for VET staff it is only a recommendation that you use it. As with the other templates, you may add extra information but you should not remove anything.

ECVET Learning Agreement

This replaces the standard Learning Agreement and must be included as an annex with the learner Grant Agreement if you are using ECVET in your project. This is compulsory if your project includes ECVET.

ECVET Memorandum of Understanding

The Memorandum of Understanding is the Partnership Agreement you should be using and including as an annex with the Learner Grant Agreement if you are using ECVET in your project. This is compulsory if your project includes ECVET.

UK NA Templates

The UK NA has developed templates to support you with managing your project and ensuring that appropriate evidence is retained to demonstrate the reality and eligibility of your project activities and expenditure.

Project Monitoring Checklist

The UK NA has developed a project checklist for you to use throughout the lifetime of your project to serve as a prompt on points to consider before, during, and after learner and staff mobility placements to ensure compliance with programme and UK NA rules.

The checklist is not exhaustive so there may be aspects of your particular project that are not included. It is not compulsory to use the checklist; however, the prompts covered form part of the requirements set out in your Grant Agreement and Annexes, as well as the Programme Guide and other beneficiary guidance produced by the UK NA. If you choose not to use this checklist, the UK NA strongly recommends that you have other project management tools and systems in place to monitor project progress and ensure you are meeting the programme and UK NA requirements.

A copy of this is included in [Annex 1](#) for reference and you can download a Word version of this template for you to edit and use from the '[manage your grant](#)' section of the website.

Mobility Declaration of Attendance

The UK NA has developed a template mobility declaration of attendance following feedback from beneficiaries. This template includes the minimum required details for a declaration of attendance to evidence that a mobility has taken place, in accordance with Annex III of your Grant Agreement. **This template does not replace the need to keep all additional evidence, such as travel tickets and invoices.**

You can use this template to record individual mobilities, separate flows of mobilities, or multiple flows to the same receiving organisation. It is not compulsory to use this template; however, you must ensure that you retain a declaration of attendance for all mobilities that meets the requirements in Annex III of your Grant Agreement. It must also be an original Certificate of Attendance, rather than a photocopy. **It is your responsibility as the beneficiary to ensure that you are aware of the evidence requirements for your project and that you have appropriate systems and templates in place.**

A copy of this is included in [Annex 2](#) for reference and you can download a Word version of this template for you to edit and use from the '[manage your grant](#)' section of the website.

Participant Receipt of Individual Support

The UK NA has developed a template for you to record and demonstrate Individual Support costs on a per participant basis. This allows you to demonstrate the arrangements you have made and paid for on behalf of the participant as well as any amounts given to them directly, either as cash or via bank transfers.

It is not compulsory for you to use this template; however, **you must be able to demonstrate that each participant has received the full amount of Individual Support they are entitled to according to the European Commission's unit costs.** If you choose to use this template, you should put it on your letterhead and make sure you include the Erasmus+ emblem.

A copy of this is included in [Annex 3](#) for reference and you can download a Word version of this template for you to edit and use from the '[manage your grant](#)' section of the website.

Sample Participant Reports

All VET and Adult Education participants must complete a participant report following their mobilities. **You must ensure that 100% of reports are submitted.** The UK NA understands that sometimes participants can find completing the report a daunting process so we have provided a breakdown of the content in each section of the report as well as links to download sample versions with all the questions. **The sample reports are for reference only to help you support your participants. The UK NA can only accept reports that have been submitted through Mobility Tool+ via EU Survey.**

Adult Education Staff

| Section of report | Type of content |
|-------------------|---|
| 1 | Explanation of the purpose of the participant report. |
| 2 | General information about the participant and the mobility, e.g. participant name, mobility dates, previous mobility experience, etc. Some of this is pre-filled based on the data in the Mobility Tool+ and some will need to be completed by the participant. |
| 3 | Questions asking the participant to evaluate their mobility and the skills and competences gained. Most questions are ranked from 'strongly disagree' to 'strongly agree'. |
| 4 | Questions about how learning from the mobility has been recognised, e.g. formal certificates. |
| 5 | Questions asking the participant to rate their overall satisfaction with their mobility. This includes the option for participants to provide additional comments and feedback that has not been addressed through the other areas of the report. |
| 6 | Options for permission to share the participant's contact details and content of the report. |

[Download a sample KA1 Adult Education staff mobility participant report](#)

VET Staff

| Section of report | Type of content |
|-------------------|---|
| 1 | Explanation of the purpose of the participant report. |
| 2 | General information about the participant and the mobility, e.g. participant name, mobility dates, previous mobility experience, etc. Some of this is pre-filled based on the data in the Mobility Tool+ and some will need to be completed by the participant. |
| 3 | Questions asking the participant to evaluate their mobility and the skills and competences gained. Most questions are ranked from 'strongly disagree' to 'strongly agree'. |
| 4 | Questions about how learning from the mobility has been recognised, e.g. formal certificates. |
| 5 | Questions asking the participant to rate their overall satisfaction with their mobility. This includes the option for participants to provide additional comments and feedback that has not been addressed through the other areas of the report. |
| 6 | Options for permission to share the participant's contact details and content of the report. |

[Download a sample KA1 VET staff mobility participant report](#)

VET Learners

| Section of report | Type of content |
|-------------------|--|
| 1 | Explanation of the purpose of the participant report. |
| 2 | General information about the participant and the mobility, e.g. participant name, mobility dates, previous mobility experience, etc. Some of this is pre- |

| | |
|----|---|
| | filled based on the data in the Mobility Tool+ and some will need to be completed by the participant. |
| 3 | Questions about the receiving organisation and the support the participant had during their mobility. |
| 4 | Questions about the languages used during mobility and the linguistic preparation and support the participant received. |
| 5 | Questions about how learning from the mobility has been recognised, e.g. formal certificates. |
| 6 | Questions asking the participant to evaluate the skills and competences gained from their mobility. Most questions are ranked from 'strongly disagree' to 'strongly agree'. |
| 7 | Questions asking the participant to evaluate their future opportunities for work and education as well as their personal outlook as a result of the mobility. |
| 8 | Questions about practical arrangements for the mobility including visa requirements, mentoring from the receiving organisation, travel, and accommodation. |
| 9 | Questions about the cost of the mobility. This particularly relates to the individual support that participants are entitled to receive based on the unit costs. |
| 10 | Questions asking the participant to rate their overall satisfaction with their mobility. This includes the option for participants to provide additional comments and feedback that has not been addressed through the other areas of the report. |
| 11 | Options for permission to share the participant's contact details and content of the report. |

[Download a sample KA1 VET learner mobility participant report](#)

Annex 1

Project Monitoring Checklist

2018 KA1 Vocational Education and Training (VET) and Adult Education Beneficiary Project Checklist

This Project Checklist serves as a prompt for all KA1 VET, Adult Education beneficiaries and charter holders, on points to consider before, during and after learner and staff mobility placements to ensure compliance with programme and National Agency (NA) rules.

Beneficiaries are encouraged to contact their Project Officer/the NA if the answer to one or more questions are answered 'No', and it is unlikely for this to change, so that support can be offered where possible.

Please note the prompts below are not exhaustive, and form part of the requirements set out in your Grant Agreement and Annexes, as well as the Programme Guide and other beneficiary guidance produced by the NA including the Handbook.

Before Mobility

- | |
|---|
| <p>1. Have you recruited participants as part of a fair, equal and transparent process and as outlined in your application form? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>2. Have you prepared participants as outlined in your application form, i.e. linguistic, cultural and pedagogical preparation? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>3. Is Individual Support in the process of being transferred to the participant and is evidence being retained, i.e. payments on their behalf, payments directly? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>4. Are formal partnership agreements in place with all partners, e.g. ECVET Memorandum of Understanding? Yes <input type="checkbox"/> No <input type="checkbox"/></p> |
|---|

5. Are all partners aware of their roles and responsibilities and of the requirements of the Grant Agreement? Roles and responsibilities for organisations participating in VET projects can be found in the Erasmus+ VET Mobility Quality Commitment of the Grant Agreement

Yes No

6. Are you in frequent contact with all receiving organisations?

Yes No

7. Are signed grant agreements in place with all participants and has placement content been formally agreed, e.g. through learning or training agreements?

Yes No

8. Are recognition arrangements in place for all participants, e.g. through Europass documents?

Yes No

9. Is Mobility Tool+ up to date? Please refer to the Guide which can be found here: (<https://webgate.ec.europa.eu/eac/mobility>):

Yes No

10. Are robust plans in place to ensure that 100% participant reports will be completed following the mobility?

Yes No

11. Only applicable to VET projects awarded OLS licences: Have all participants completed their initial assessment?

Yes No

12. Only applicable to VET Mobility Charter (VMC) Holders: Are you documenting your work in meeting and developing your European Internationalisation Strategy as set out in your VMC application?

Yes No

13. Only applicable to Adult Education projects which did not provide host partner/s in the application form: Have you informed your Project Officer/the NA of the details of your receiving partner organisations, i.e. organisation name, PIC, and experience?

Yes No

During Mobility

14. Are participants being monitored as outlined in your application form, i.e. are you in frequent contact with host organisations, accompanying persons etc.

Yes No

15. Are you recording relevant information to include in your Final Report, and are you aware of the deadline for submission outlined in your Grant Agreement to ensure you submit it on time?

Yes No

16. As prompted in the 'Before Mobility' section: are robust plans in place to ensure that 100% participant reports will be completed following the mobility?

Yes No

After Mobility

17. As prompted in the 'During Mobility' section: are you recording relevant information to include in your Final Report, and are you aware of the deadline for submission outlined in your Grant Agreement to ensure you submit it on time?

Yes No

18. Have 100% Participants Report been completed and submitted?

Yes No

19. Is the Mobility Tool+ up to date including budget items? Please refer to the Guide which can be found here (<https://webgate.ec.europa.eu/eac/mobility>):

Yes No

20. Are you measuring the immediate impact of the mobility and putting in place a plan for long-term impact assessment?

Yes No

21. Is evaluation of the project being conducted as outlined in your application form?

Yes No

22. Is the European Project Results Platform being used to disseminate project results? (using EPRP is an optional choice, but should be considered)

Yes No

23. Is the NA being kept informed of any good practice examples for dissemination on the NA's website?

Yes No

24. Has Individual Support been transferred to the participant and evidence of transfers been retained i.e. payments on their behalf, payments directly?

Yes No

25. Only applicable to projects awarded OLS licences: have all participants completed their course and second assessment?

Yes No

- If applicable, have any significant changes been communicated to your Project Officer/ NA in good time in line with NA requirements?

Yes No

- If applicable, have any budget transfers been communicated to your Project Officer/ NA in good time in line with NA requirements?

Yes No

Annex 2

Declaration of Attendance Template

Declaration of Attendance

Erasmus+ KA1 Mobility

| | |
|---------------------------------|--|
| Project Reference Number | |
| Project Title | |

The following participants have completed a KA1 mobility as part of the above project. The purpose of this mobility was:

| |
|--|
| |
|--|

Sending organisation details

Name:

Location (city and country):

Receiving organisation details

Name:

Location (city and country):

Participants

| Participant name | Mobility start date | Mobility end date |
|-------------------------|----------------------------|--------------------------|
| | | |
| | | |
| | | |
| | | |

| | | |
|--|--|--|
| | | |
| | | |
| | | |

Accompanying Persons

| Accompanying person name | Mobility start date | Mobility end date |
|---------------------------------|----------------------------|--------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Signature of receiving organisation

Name of signatory:

Place of signature:

Annex 3

Participant Grant Receipt Template

Participant Grant Receipt

Erasmus+ KA1 Mobility

| | |
|---------------------------------|--|
| Project Reference Number | |
| Project Title | |

I [participant name] acknowledge receipt of the amount details below which has been paid to me via [bank transfer/cash] from [Beneficiary organisation name and address].

I further acknowledge that [Beneficiary organisation name] will provide those items detailed as advance expenditure and any amount remaining unspent on successful completion of the mobility will be transferred to me.

The payment is made in respect of individual support for the above project and based on the total individual support grant amount of €XXX.XX¹ and comprises:

| | |
|--|--|
| Advance expenditure² | |
| Accommodation | |
| Food | |
| Local Transport | |
| Planned excursions and entry fees as arranged etc. | |
| Petty cash | |

¹ Individual support amount per participant unit costs detailed in annex IV of the Grant Agreement

² To be paid by beneficiary to partner or participants before or during mobility

| | |
|----------------------------------|--|
| Others as needed ³ | |
| Total advance expenditure | |

| | |
|--|--|
| Balance remaining after advance expenditure in Euros ⁴ | |
| 20% retention (paid on successful completion of the mobility) ⁵ | |
| Balance to pay participants in £ Sterling (Exchange rate⁶ =) or € | |

Participant signature:

Beneficiary organisation signature:

Date and place of signature:

Date and place of signature:

³ For example specific equipment needed for mobility activities

⁴ Overall amount – advance expenditure

⁵ Not mandatory and needs to be clearly communicated to participants prior to mobility if used

⁶ Please article I.4.9 of the Grant Agreement for the exchange rate