ERASMUS+ KA171 Call 2024
Project Management
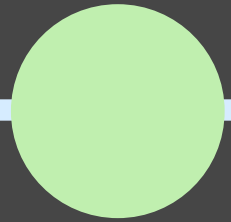
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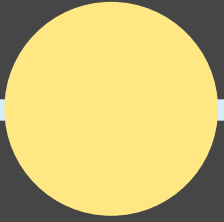
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Institutional Erasmus+ Coordinator (IEC)
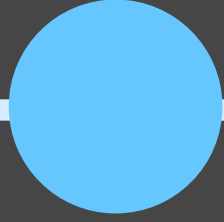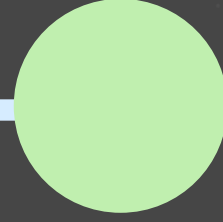Miranda Bönhke, Enschede, 24.07.2024

In this presentation

Roles in the Project

Set-up Project Framework
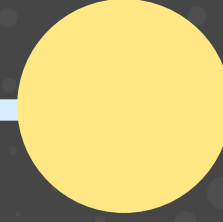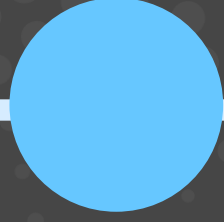
Project Administration

Mobility Participants Process

Project Finances & Audit rules

Changes to your project

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Roles in the Project

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Coordination Roles

1. National Agency Erasmus+ The Netherlands (NA)

- Awards the Dutch institutions
- Port of call for IEC's for questions
- Assesses amendment requests
- Monitors overall proceeding in view of compliance
- Ensure auditing via desk checks and site visits
- Assesses UT reporting

2. Faculty level Project Coordinator (PC)

- Port of Call for selected mobility participants
- Responsible for timely nominations
- Responsible for timely reporting
- Responsible for dissemination on project
- Jointly monitors project proceedings
- Liaison for faculty level HR officers (placement and staff)

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3. Institutional Erasmus+ Coordinator (IEC)

- Liaison between NA and UT and PC
- Provides structures for project administration & monitoring
- Supports dissemination activities
- Monitors proceedings in view of compliance, incl. ECHE
- Coordinates timely (intermediate) reporting
- Responsible for adequate and complete BM administration
- Responsible for adequate and complete UT administration

- Monitors depletion of budgets
- UT Agreement signatory for E+ IIA's
- Coordinates info and communication on KA171 to PC
- Port of call for PC i.e changes and amendments to project
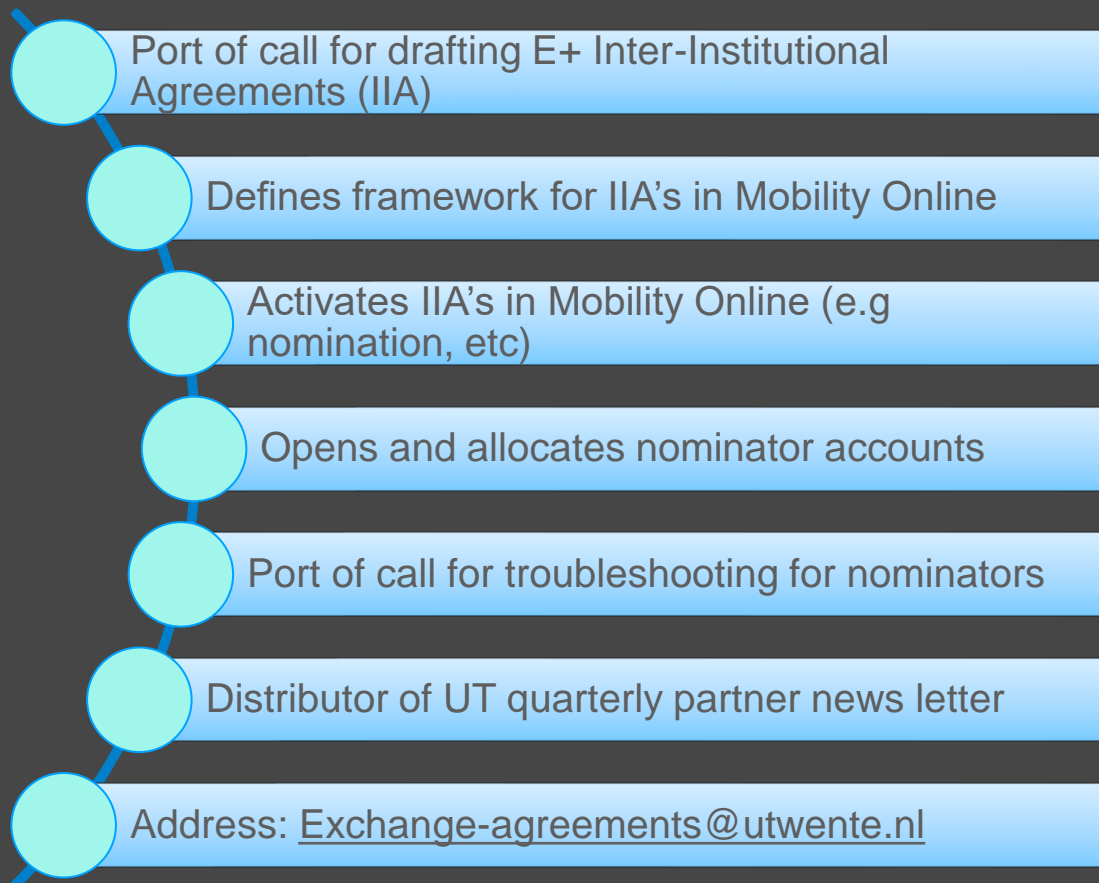- Address: m.bonhke@utwente.nl

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Support Roles

1. Exchange Agreement Administrator (EAA)

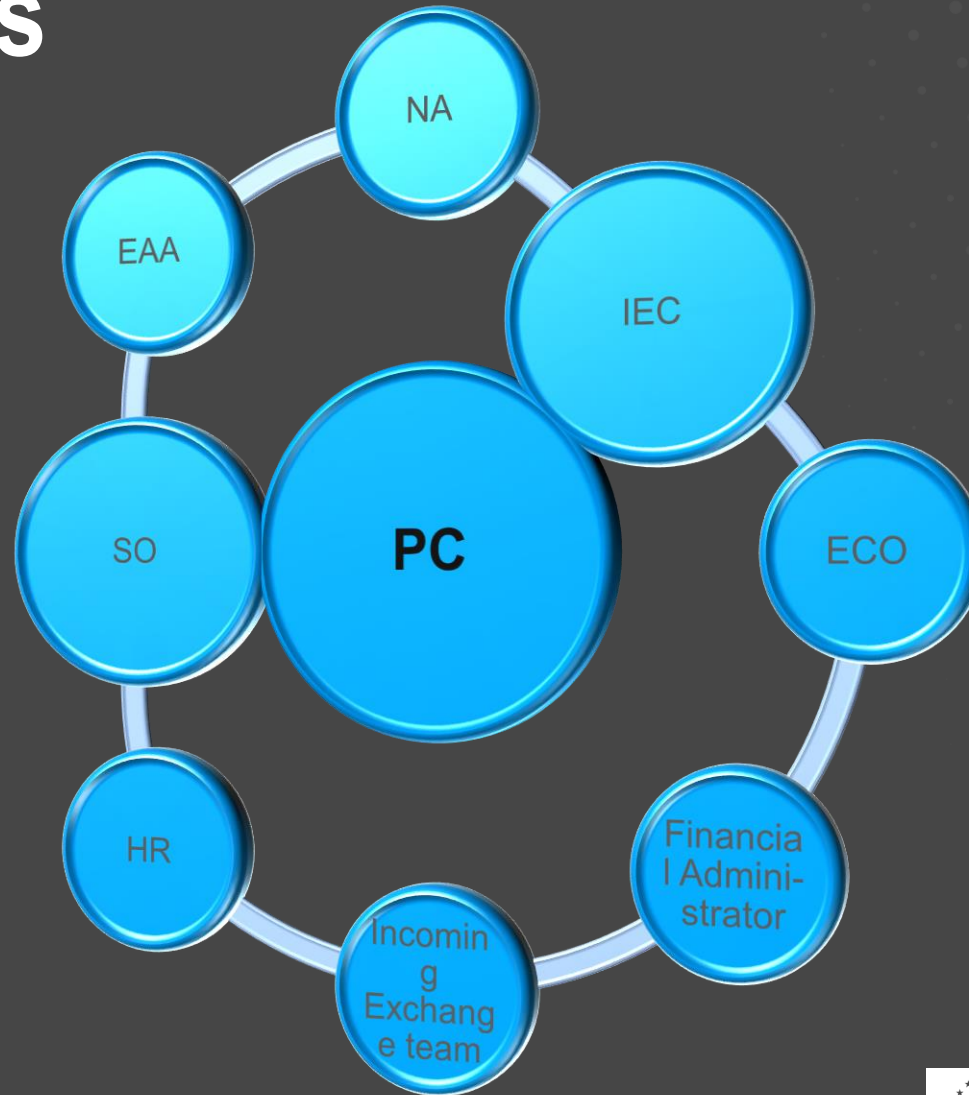- Port of call for drafting E+ Inter-Institutional Agreements (IIA)
- Defines framework for IIA's in Mobility Online
- Activates IIA's in Mobility Online (e.g nomination, etc)
- Opens and allocates nominator accounts
- Port of call for troubleshooting for nominators
- Distributor of UT quarterly partner news letter
- Address: Exchange-agreements@utwente.nl

2. Mobility Scholarships Support Officer (SO)

- Supports access to application for KA171 scholarships (MO)
- Ensures sound, timely and complete E+ administration
- Monitors proceedings registration of mobility participants
- Provides timely payment orders for scholarships
- Liasion for HR & CES visa and housing proceedings
- General support office for E+ recipients
- Address: staff-mobility-ces@utwente.nl

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Support Roles

Set-up Project Framework

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Securing ERASMUS+ funding

LEGAL STATUS INSTITUTION

- Financial Identification form
- Legal Entity Identification form
- Recent Bank statement
- Power of Attorney statement
- UT's institutional's registration data

All doc's are updated in European Commission's
Organisation Registration System via IEC
All data in the ORS are updated by EU-grant office

In collaboration with EU grant office

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Securing first instalment

T = start of your project

INSTITUTIONAL GRANT AGREEMENT (GA)
(T-3 M.)

- Contract between UT and NA
- Lays out terms and conditions for Project
- Signing underpins financial flows, compliance to audit rules and conditions for both parties

Process:
- IEC prepares GA for signing Legal Representative.
- IEC provides NA a single-signed copy within 49 days of receipt.
- NA provides a double-signed copy within 30 days of receipt of single-signed copy.
- IEC assures UT/NA signed copy is archived.
- IEC provides the financial administrator with a copy.
- IEC request work ordernumber for receipt of 1st installment.

ERASMUS+ INTER-INSTITUTIONAL AGREEMENT (E+IIA)
(T-2 M.)

- "Contract" between partner institution and UT.
- Signing underpins adherence to the ECHE principle by both parties and identifies IN/OUT flows and subsequent support for participants.

Process:
- PC provides EAA with completed IIA application form.
- EAA drafts IIA, shares with the PC (IEC is in cc).
- PC completes draft with the partner institution. Partner institution signs first. A single-signed copy is return to EAA.
- EAA shares single-signed version with IEC.
- IEC checks contents and signs second. The final E+ IIA is shared with EAA for processing in Mobility Online.
- A copy is provided to PC. A copy is archived in JOIN.

Mobilities can start with GA and E+IIA in place

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Securing compliance and 2nd instalments

INTERIM (FINANCIAL) REPORT

First installment reaches 70% in spending, or at least by: **19 March 2026**

Process:
- IEC will take care of this report in silo.
- IEC prepares format to be signed by Legal Representative.
- IEC sends format to NA.

FINAL (NARRATIVE AND FINANCIAL REPORT

All mobilities to be completed (incl. documentation) prior to end of project duration (31 July 2027)
Reporting by **29 September 2027**

Process:
- IEC will request PC for narrative reporting through format (T-2m.)
- IEC processes contribution (T-2w).
- IEC will submit on PC behalf to the NA.
- Copy will provided to PC by IEC.
- Subsidy decions

Monitoring meetings for PC and IEC by NA each year

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Project Administration

Systems in use

Mobility Online with connection to ***OSIRIS***	Main UT adopted system for registration of credit-bearing (equivalent) mobility, maintained by CES
	Framework for Erasmus+ Inter-Institutional Agreements, and establishes relation with IN/OUT mobilities
	Support nomination, participant registration, scholarship application
Beneficiary module – maintained by CES/SP INT	Mandatory administrative module for KA1 projects, operated by the NA
	Entries maintained by CES
	Report of individual mobilities, reporting and budget spending to European Commission
Operational UT work drive P:/	Project overviews (planned, allocated and executed mobilities)maintained by IEC
	Project documents, contract (incl annexes), amendments, subsidy decisions
	Individual mobility participant files with GA, MA/LA, CoA, ToR (if applicable forms top-ups)
UNIT4: Expense claims and Payment orders	Main UT adopted process for payment of third-flow scholarships, managed by FIN
	Payment orders – incoming staff and all students
	MyFIN – expense claims module – UT staff
MSteams	UT adtopted knowledge sharing platform, through open QandA and provides KA171 documentation
	KA171 communication channel, for updates in framework
	Communication channel of NA for monitoring visits

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Mobility Participants process

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Students: Nomination & registration

(T= start date of mobility)

Plan mobility T-3m
- Project coördinator (1) connects to partner contact and (2) must inform IEC which student will receive an E+ scholarship with the project (=nominated)
- IEC to inform faculty-level Exchange Coordinator and SO

Nominations (T-3m)
- Partner contact (nominator) nominates incoming student(s) via Mobility Online
- Outgoing students do not have to be nominated in Mobility Online
- Incoming student can be nominated for 'courses' (based on existing deadlines!); SMS , or 'Placement (can be nominated year-round)'; SMT

Plan mobility T-3m
- Students complete registration in MO (personal details, study plan, scholarship application). Students for courses based on existing deadlines!
- With this, the student contibutes to UT's Duty of Care, where in case of calamity in the area of stay the UT can reach out the student.
- MO and OSIRIS workflow guides student to information on banking, visa, Housing and insurance information by Admission Office (Incoming Exchange team – CES/SAS.
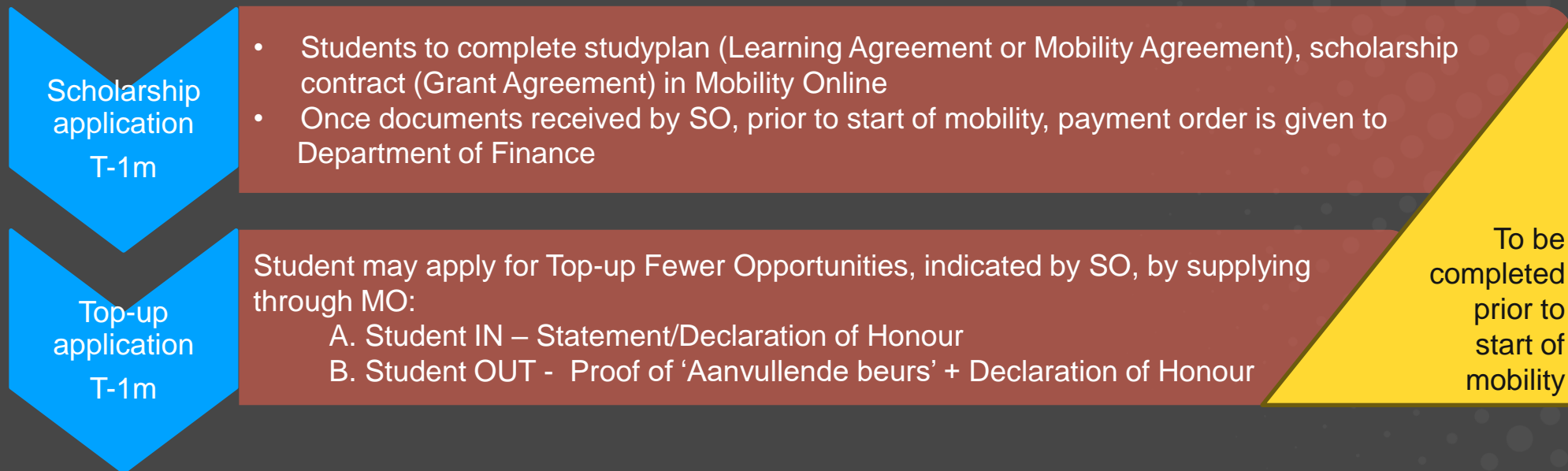- If placement or training with visa/workpermit, the HR international team guide student further.

Point of attention: Placement and training processing may be 3 months due to potential visa and work permits (via HR). PC is to verify with HR faculty in case of staff mobility if HR registration is required in view or work permits/housing offer/insurance.

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Student Scholarship

Scholarship application — **T-1m**
- Students to complete studyplan (Learning Agreement or Mobility Agreement), scholarship contract (Grant Agreement) in Mobility Online
- Once documents received by SO, prior to start of mobility, payment order is given to Department of Finance

Top-up application — **T-1m**

Student may apply for Top-up Fewer Opportunities, indicated by SO, by supplying through MO:
- A. Student IN – Statement/Declaration of Honour
- B. Student OUT - Proof of 'Aanvullende beurs' + Declaration of Honour

To be completed prior to start of mobility

Rule of thumb for signatures:
A. Adope PDF signature through 'Fill and Sign' (not locked after signing), or
B. Digitally signed in Adobe PDF (not locked after signing), or
C. 'Wet' or blue ink signature and provide a scanned copy in PDF

It is not allowed to copy/paste a picture of a signature into a Word or PDF document.

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Student securing grant

End of mobility
- Student to submit E+ evaluation ("Participant Report"/"EU survey").
- Student to supply Transcript of records (ToR). A copy is to be sent to SO. Or, Statement of the host (SoH). SoH Format is supplied by SO to mobility participant. A completed copy is to be sent to SO.

End of mobility

By supplying the above, this is considered a request for payment of the scholarhship or remainder instalment thereof. Not supplying these documents may result in a withdrawal of the grant. An incomplete mobility participant file may also result in a penalty for the UT.

Rule of thumb for ToR and, or SoH, and CoA:
These documents must include start- and end date of mobility, signature and stamp of host organization. If ToR does not state start- and end-date a SoH with dates must complement ToR.

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Staff: Nomination & registration

(T= start date of mobility)

Plan mobility T-3m
- Project coördinator (1) connects to partner contact and (2) must inform IEC which staff will receive an E+ scholarship with the project (=nominated)
- IEC to inform faculty-level Exchange Coordinator and SO

Nominations (T-3m)
- Staff mobility participants do not have to be nominated in Mobility Online.
- UT staff registers mobility in Mobility Online. (personal details, study plan, scholarship application)
- Incoming staff follows a paper-route initiated by SO

Plan mobility T-3m
- UT staff is to register the travel per " DECLARATIEVOORSCHRIFT, art.8.10" in the ""[registratie buitenland en reisverzekering](#)" application
- The registration also contributes to the UT's Duty of Care, where UT can reach out to you in case of calamities in your area of stay
- Academic arranges *stay at UT* with PC (hotel/residence, visa/workpermits, insurance). It is advised to connect to the faculty HR officer for visiting staff

Point of attention: Placement and training processing may be 3 months due to potential visa and work permits (via HR). PC is to verify with HR faculty in case of staff mobility if HR registration is required in view or work permits/housing offer/insurance.

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Staff Scholarship

Scholarship application

T-1m

- UT Staff to complete workplan (Mobility Agreement), scholarship contract (Grant Agreement) in Mobility Online.
- Incoming Staff complete a workplan, scholarship contract as well, but in a paper-route.
- Once documents received by SO, prior to start of mobility, payments can be settled.

To be completed prior to start of mobility

Rule of thumb for signatures:
A. *Adope PDF signature through 'Fill and Sign' (not locked after signing), or*
B. *Digitally signed in Adobe PDF (not locked after signing), or*
C. *'Wet' or blue ink signature and provide a scanned copy in PDF*

It is not allowed to copy/paste a picture of a signature into a Word or PDF document.

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Staff securing grant

End of mobility

- Staff to submit E+ evaluation ("Participant Report"/"EU survey").
- Staff to supply Certificate of Attendance. Format is supplied by SO to mobility participant. A completed copy is to be send to SO.

End of mobility

By supplying the above, this is considered a request for payment of the scholarhship or remainder instalment thereof. Not supplying these documents may result in a withdrawal of the grant. An incomplete mobility participant file may also result in a penalty for the UT.

Rule of thumb for ToR and, or SoH, and CoA:
These documents must include start- and end date of mobility, signature and stamp of host organization. If ToR does not state start- and end-date a SoH with dates must complement ToR.

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Project Finances & Audit rules

Students Payment of scholarship

UT students

- Student OUT is paid toward Dutch bank account.
- 75%-25% (2 instalments)
- 2nd instalment: Supply of the aforment mentioned documents constitute as a request for (final) payment of the scholarship.

Rules for payments:
1. *Must be traced to the Erasmus+ recipient in a closed process.*
2. *Must not differ from rest of student population (ECHE)*
3. *Approval authorization must be in place*
4. *There is no pre-mobility financing (yet).*
5. *Paid towards bank account as stipulated by student mobility participant in the Grant Agreement (excl. PhD for student mobility)*

Incoming students

- Student are paid towards a Dutch IBAN bank account, obtained when in NL.
- FIN does not prefer standard cash payments to bridge any gaps to obtaining NL account. Hence, use Revolut or Bunq as alternative. However, we push for:
- Cash payment for two weeks **upon** arrival, upon explicit support request of PC
- 75%-25% (2 instalments)
- 2nd instalment: Supply of the aforment mentioned documents constitute as a request for (final) payment of the scholarship.

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Staff Payment of scholarship

UT staff

- Via Expense claims (myfin.utwente.nl → Expenses)
- Make a claim on the work order number SO provides you in the Grant Agreement
- Add your double signed Grant Agreement as your receipt

Rules for payments:
1. *Must be traced to the Erasmus+ recipient in a closed process.*
2. *Approval authorization must be in place*
3. *There is no pre-mobility financing (yet).*

Incoming staff

- Staff are paid towards a Dutch IBAN bank account, obtained when in NL (preferred route)
- FIN does not prefer standard cash payments to bridge gap to obtaining NL account. Hence, use Revolut or Bunq as alternative. However, we push for:
- Cash payment for two weeks **upon** arrival, upon explicit support request of PC
- Stay > 1 month = 75%-25% (2 instalments)
- 2nd instalment: Supply of the aforment mentioned documents constitute as a request for (final) payment of the scholarship.

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Dissemination

Dissemination plan for KA171 projects:
- Project card on the UT Erasmus+ website
- Employer news i.e. Utoday/Campus magazine interviews, social media, presentations at multiplier events, etc.
- Erasmus+ Inspire days

Rule of thumb for dissemination:
Use the E+ logo and disclaimer

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Changes to your project

Basics for KA171

Project duration

First day of singing the Institutional Grant agreement up to and including 31.07.2027

All mobilities must be completed prior to 31.07.2024

Extension of funds for mobilities beyond this date are not possible

Extension the project duration is not possible

Scholarship

Amount is based on Duration: Start of the mobility activity up to and including end day of mobility activities + 2 travel days

Amount is based on Distance: Calculated based on the Erasmus+ Distance Calculator in relation to the Annex: Applicable Rates

Amount is based on Nature: Student mobility is a monthly contribution. Staff is a daily contribution.

Amount is in accordance with allocation in your awarded project

Student per cycle: Min. 2 months to max of 12 months

Staff unlimited (but in accordance with your supervisor/team lead or HoD : min. of 5 days (excl. travel days) per country to max of 60 days

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Basic Rules KA171

Limitations & changes without amendment	**It is possible to:**
	Transfer 100% of student mobility funds in your project between category courses and placement
	Transfer 100% of staff mobility funds in your project between category training and teaching
	Transfer 10% of the overall (all projects) in any category of student mobility funds to any category staff mobility
	Transfer 100% of the overall (all projects) in any category of staff mobility funds to any category student mobility
	Increase or reduce number of mobilities within your awarded project (e.g. you were awarded one mobility of 60 days. You are allowed to split this mobility into 2 mobilites, of 30 days each. Keep in mind you will only receive travel for the one awarded mobility, as this is a standard in compliance to Annex: applicable rates and accordance to your initial award). It must align with your project proposals' envisaged impact.
	Change IN- to OUT flows, but (!) only for 40% of the overall budget (all projects)

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Changes with amendment request

Adding new partner institutions to your project

Transfer funds allocated for top-ups for students to other budget categories

Transfer funds from country to country in the same region

Changes not possible

Transfer funds to short-, first- and second cycle (Ba/Ma) outgoing student mobility to any of the Partner Countries that are recipients of official development assistance (ODA).

Transfer funds from country to country from different regions.

Add countries not indicated in the allocation.

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Q&A

Institutional Erasmus+ Coordinator (IEC)
Miranda Bönhke, Enschede, 24.07.2024

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Contact details

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