

Resource Pack for Erasmus Preparatory Visits 2013

General Overview - Preparatory Visits

Objectives and description of the action

The main objective of the action is to help higher education institutions (HEI) to establish contacts with prospective partner institutions with a view to establishing:

- New inter-institutional agreements (not renewals) relating to student and/or staff mobility
- Erasmus Intensive Programmes;
- Erasmus student placements;
- Erasmus networks;
- Erasmus multilateral projects;
- Erasmus accompanying measures.

In order for a HEI to be able to apply for a Preparatory Visit grant, it must be the holder of an Erasmus University Charter (EUC).

The preparatory visit grant may be used to visit:

- Either one or more prospective partner higher education institutions (the visited HEIs do not need to have an EUC);
- Or an enterprise or organisation.

In addition, preparatory visit grants may be awarded to enterprises or other organisations for the purpose of helping them to establish consortia for the organisation of Erasmus student placements.

Who can benefit

- Individuals working in a higher education institution holding an EUC
- Staff from enterprises or other organisations in the case of visits designed to help establish student placement consortia.

Usually a grant is awarded to just one person per visit, but in exceptional cases two staff from the same institution can be awarded a grant to undertake a visit together. Only one visit per potential project will be funded.

Applications for preparatory visits are not eligible once the corresponding project application has been submitted.

Who can apply

- Higher education institutions holding an Erasmus University Charter
- Enterprises or other organisations
(Enterprises or other organisations are eligible if there is no consortium in their country and only if the purpose of the visit is to benefit from the experience of consortia abroad in view of establishing a consortium for the organisation of Erasmus student placements).

Application Deadline

31 January 2013 and 6 weeks before the date of travel

Minimum Duration

1 day

Maximum Duration

5 days

Comment on Duration

All activities must end by 31 October 2013 at the latest.

Preparatory Visits

A Preparatory Visit gives you the opportunity to start building the personal relationship on which a successful Erasmus partnership depends.

Many Preparatory Visits are intended to lay foundations towards the establishment of an Inter-institutional agreement related to student and/or staff mobility exchanges. During the visit a variety of issues should be addressed, such as the suitability of the curriculum, the pastoral responsibilities of the participating organisations, preferred means of communication, languages to be used for teaching and numbers of mobilities to be undertaken.

If the anticipated partnership is intended to be for a collaborative EU-funded activity, such as an Intensive Programme, you should use some of the time together to start the funding application for your project. You can discuss issues such as the work plan, the roles and tasks of the participating organisations, means of communication, languages to be used and specific activities to be undertaken in the course of the project.

But in addition to this, you will also get to know your partner institutions, their systems and their cultures.

Preparatory Visits are designed to pave the way for an Erasmus partnership, so they must take place before any collaborative activity is applied for or mobility exchange carried out. They can take place at any time in the year. You should apply to the British Council at least 6 weeks before your intended visit.

Preparatory Visits can last for up to five days and a maximum of two participants may be funded.

Preparatory Visits must be pre-funded by the sending institution as payment is made by the British Council following submission of a report following the visit.

Please note **no** funding is available to meet costs incurred by the institution hosting a preparatory visit.

The application form is available at <http://www.britishcouncil.org/erasmus-institutions-apply.htm>

Before completing the application form, please read the relevant sections in the 2013 Call for Proposals published by the European Commission and the Lifelong Learning Programme Guide for 2013, which contain additional information on closing dates, National Agency addresses to which the application must be sent, and specific priorities for the year 2013. Links to these documents and further information can be found on the Lifelong Learning Programme website http://ec.europa.eu/education/lifelong-learning-programme/doc78_en.htm and the UK National Agency website www.britishcouncil.org/erasmus

UK subsistence rates for 2013 for Preparatory Visits (euro)

Country	Daily rate €	Country	Daily Rate €
AT Austria	135	IS Iceland	135
BE Belgium	128	IT Italy	143
BG Bulgaria	83	LI Liechtenstein	195
CH Switzerland	195	LT Lithuania	98
CY Cyprus	113	LU Luxembourg	128
CZ Czech Republic	113	LV Latvia	98
DE Germany	120	MT Malta	105
DK Denmark	173	NL Netherlands	135
EE Estonia	98	NO Norway	195
EL Greece	120	PL Poland	98
ES Spain	128	PT Portugal	113
FI Finland	158	RO Romania	90
FR France	150	SE Sweden	158
HR Croatia	120	SK Slovakia	105
HU Hungary	105	SI Slovenia	120
IE Ireland	143	TR Turkey	105

Additional grants are available for staff with disabilities wishing to participate in a Preparatory Visit. These allowances are offered in cases where severe disability leads to mobility costs which exceed the maximum grant allocations allowed and which cannot be recovered from other sources.

Staff who need to apply for a special needs allowance should do so at the same time as the Preparatory Visit application is made. The application form is available from our website. The sending HEI is responsible for ensuring that forms are correctly and fully completed, and that the necessary arrangements are being made at the host institution to meet the participants' needs.

If approved the UK National Agency will specify a maximum supplementary allowance. The actual amount of financial support will be provided on the basis of actual expenditure, for which receipts must be retained, up to the maximum grant specified. On completion of the Preparatory Visit a final report of expenditure will be required.

Common European Eligibility criteria for Preparatory Visits

All criteria must be met in order for the application to proceed to the next stage of assessment

The grant application complies with the application procedures in the 2013 Lifelong Learning Programme Guide and has been submitted on the 2013 grant application form respecting the closing date of 31 January 2013.

The grant application has been completed in full.

The amount of grant requested has been expressed in Euros.

The applicant organisation is a legal body.

The applicant and the host organisation(s) are located in countries participating in the Lifelong Learning Programme.

The visit destination(s) is/are located in one/maximum two countries.

The applicant organisation has not submitted another grant application for the activity intended to be prepared during the preparatory visit.

The grant application bears the original signature of the person legally authorised to sign on behalf of the applicant organisation, as well as the original stamp (if applicable) of the applicant organisation.

Common European Quality Assessment criteria

These are the criteria against which your application will be assessed. It is advisable to ensure that you address these fully when completing your application form.

PREPARATORY VISITS

Content and duration

The future cooperation idea to be developed during the preparatory visit is presented clearly. Reference is made to the type of the future project/partnership/network, its theme, main aims and possible partner countries.

There is a clear planning of the activities to be developed during the preparatory visit.
The duration of the visit is sufficient to accomplish the proposed activities

Relevance

There is a clear link between the specificity of the applicant's home organisation (type of organisation, activities and strategy), the proposed partnership/project/network and the purpose and content of the preparatory visit.

The activities proposed are realistic, reasonable and may contribute to draft the future project/partnership given the time frame of the visit

The qualifications and the professional background of the participant are relevant for drafting the proposed project/partnership/network.

In case of two staff persons from the same organisation, the role and responsibilities of the second person are relevant for drafting the proposed project/partnership/network.

In case of two destinations, the explanation provided by the applicant organisation is clear and relevant for drafting the proposed project/partnership/network..

The grant requested is realistic and coherent with the activity planned.

Final Report Guidelines for Preparatory Visits

HOW THE GRANT IS PAID

The grant award is calculated in EURO and is paid on the participant's return, upon receipt of a satisfactory final report (plus bank details if required). The final report must be submitted within 30 days of the visit. The payment will be made within 45 days of approval of the final report.

DOCUMENTS TO BE SUBMITTED

- Final report form** Annex II of your grant agreement. This lists the activities & outcomes of the visit/seminar as well as stating/claiming eligible expenses.
- Bank Details** Only necessary if different to the account we use for Erasmus mobility payments.
- Annex III. To be submitted on the institution's headed paper, or with the institution's compliment slip attached. Details should include:
- Bank Name, Bank Address, Account Name, Account Number, Sort Code and Confirmation of EURO BACS transfer capability (most high street banks have this)
- NB: Payments cannot be issued to individual members of staff.**
- Proof of expenditure** **Subsistence**
Subsistence is paid at a flat rate; we do not require evidence of expenditure.
- Travel**
Receipts will need to be kept for all travel expenditure. If air travel is involved the boarding pass must be retained. All supporting documents (receipts/proof of expenditure/boarding passes) must be submitted with your report. Please keep copies if you are sending originals to the British Council.

Final report has to be submitted to the British Council no later than 30 days after the completion of activity.

All expenses should be reported in euros. Amounts of actual costs in sterling shall be converted into euro at the monthly accounting rate established by the European Commission and published on its website¹. Applicable on the day when the grant agreement is signed by the NA, the rate is given on Annex IV, which is sent to you along with the signed and countersigned grant agreement.

Failure to submit these documents within the time scale could mean the award is withdrawn and the grant holder would be liable for any expenses already incurred (such as airfares).

¹ <http://ec.europa.eu/budget/inforeuro/index.cfm?fuseaction=home&SearchField=&Period=2009-2&Delim=,&Language=en>

GUIDELINES FOR FILLING IN THE FINANCIAL CLAIM SECTION OF THE FINAL REPORT

	Travel	Subsistence
ELIGIBLE EXPENSES	<p>Door-to-door travel between home and visit/seminar location using standard class fares on public transport: plane, train, ferry or bus.</p> <p>A journey by private car should only be used if public transport is not available, or is clearly impractical. Justification for its use needs to be provided to the National Agency, and approval needs to be given. Similarly, hire car may only be used if no other suitable transport is available, satisfactory justification is provided, and approval is given.</p>	<p>Subsistence is given at a fixed rate per day. It is intended to cover:</p> <p>Accommodation Meals Travel insurance Local travel Incidental expenditure</p>
Examples of expenses <u>NOT</u> eligible	<p>Local day-to-day travel, such as bus/metro to school from hotel. Bank charges Supply cover</p>	<p>Extra days</p>
How much can I claim or receive?	<p>Up to the maximum amount awarded in your grant agreement schedule (Annex I). You should claim actual costs, for which proof of expenditure must be provided if requested.</p> <p>Expenses relating to the use of a private car, if approved by the national agency, should be claimed in the final report. These expenses will be reimbursed up to the scheduled travel award, normally based on the demonstrably equivalent cost of the most economical standard class fares, or, at the cost stated on a fuel receipt, dated on the day of departure, whichever is lower. For use of hire car: You should claim Class A at cost in your final report, retaining the relevant receipt(s).</p>	<p>Up to the maximum amount awarded in your grant agreement.</p> <p>Amount awarded is paid according to a flat rate per day abroad. If the number of days reported is less than originally approved, the amount will be reduced accordingly. Extra days not approved will not be funded.</p>
Do I need to keep proof of expenditure?	<p>YES</p>	<p>NO</p>