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Manual KA171 mobilities

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1 Introduction

Erasmus KA171 is a funding action under Erasmus+ for higher education institutions to support mobility between **Programme Countries** (mostly EU/EEA) and **Partner Countries** (third countries not associated with Erasmus+). KA171 enables institutions to submit project applications for mobility of students, for study or traineeship, and staff, for teaching or training between their institution and partner universities in third countries (outside the Erasmus+ Programme Countries).

The programme has several strategic objectives:

- To enhance **skills and employability** of students and staff by giving them an international experience.
- To encourage **innovation, entrepreneurship, creativity**, knowledge exchange, multidisciplinary teaching and learning.
- To strengthen the **international dimension** and **capacity** of higher education institutions (HEIs) by opening partnerships beyond Europe.
- To broaden the range of destinations for mobility, enabling mobility to and from non-European partner countries, thereby increasing the attractiveness of the European HEIs globally.
- To foster strategic partnerships between HEIs, and between education/training institutions and the labour market.

Opportunities of the programme

- For **students**: The chance to study abroad in a non-European country, or to do a traineeship/internship abroad in a partner country (outside the EU). This can enrich your CV, cultural understanding, and language/digital skills.
- For **staff** (both academic and administrative): Opportunities to teach abroad, to do professional training, job-shadowing or observation periods in partner institutions in third countries. This means developing your skills, building international networks, contributing to institutional internationalization.
- For the **institution**: To receive funding for mobility projects that can boost its international reputation, build global partnerships, diversify mobility flows beyond Europe, and engage in international cooperation projects.
- For both incoming and outgoing mobility: Institutions can host students/staff from partner countries, as well as send their own students/staff to partner countries.

This document

This document is a manual for all colleagues at Vrije Universiteit Amsterdam who are involved in a KA171 project. It describes timelines, roles and responsibilities. **It is mandatory to read this manual and adhere to the financial procedures mentioned below.**

2 Start project KA171

Opening of the CALL and application (Erasmus+ coordinator)

The National Agency Erasmus+ (Nuffic) publishes an annual call for proposals for KA171 around November /December. An internal 'call of interest' will be sent to all interested parties within VU by the VU Erasmus+ coordinator around November. Input will be reviewed by a VU committee, and

successful internal applicants are selected to participate as project leaders in the new call. The VU Erasmus+ coordinator will inform those project leaders about the procedures and responsibilities and the input required for the institutional application in December. All project leaders must submit their input for the institutional application mid-January, and the VU Erasmus+ coordinator will submit the institutional application before the deadline set by the National Agency Erasmus+ (usually mid-February).

Budget allocation [National Agency]

The National Agency informs VU Amsterdam about the provisionally allocated Erasmus budget per project between March and July. Erasmus+ coordinator informs project leaders.

At the start of the CALL, 80% of the allocated budget is transferred from the NA to VU Amsterdam. This is divided among the WBS numbers per project. For example, if €10,000 is allocated for a project, initially €8,000 will be transferred to the appropriate budget number will be transferred. Provided that at least 70% of the budget is spent, at the time of the mid-term reporting to the National Agency, the remaining 20% will be transferred. Alternatively, at the completion of the CALL, upon expenditure of the budget, the remaining 20% (or less) will be requested and credited to the project.

In principle, allocated budgets for projects cannot be used for other projects; however, there are exceptions which are stipulated in the 'International Credit Mobility' (ICM) manual from Erasmus+. The Erasmus+ coordinator will share the ICM-manual at the start of the project with all project leaders. Exceptions need to be approved in advance, in consultation with an Erasmus+ coordinator and the National Agency Erasmus+.

Institutional Agreement [Erasmus+ coordinator + project leader]

The first step after the budget allocation and transfer of funds is to set up the Inter-Institutional Agreement (IIA) between VU Amsterdam and the respective partner(s). The IIA serves as the official contract in which agreements are defined regarding the exchange of students and/or staff and practical matters regarding contact persons and information and distribution of OS funds.

- Per country a project leader within VU/IO/CIS and the partner university must be assigned
- The IIA is completed by the project leaders and signed by the Erasmus+ coordinator (mandated by the Executive Board) of VU Amsterdam and designated responsible person at the partner (usually Executive Board).

Identifying staff for staff exchange [Project leader]

Per country the identification of staff can differ depending on the cooperation relationship between VU and its partner e.g.:

- In Kenya, CIS-VU already had an ongoing project to which Erasmus+ was linked. Staff who have already played a role in the project could use exchange.
- For Bhutan, collaborative relationships between academics did not yet exist. In this case both VU and RUB put out internal calls for interested staff. These staff were able to express their interests to the project leader.

Selection of Staff [Project Leader]

1. The project leader requests a CV and cover letter from each interested staff member.
2. These are then sent to the Erasmus+ Project Leader of the host party.

3. The receiving party checks internally whether there is interest within the faculty/department concerned is interested in receiving the employee.

2.1 Prepare staff exchange

Project leader will discuss the following topics with the receiving faculty/department VU:

1. The receiving faculty/department appoints a contact person.
2. The contact person and the exchange staff jointly agree on dates for visits and content.
3. As soon as the mobility is planned, the grant and mobility agreements must be filled out with the assistance of the project leader.

Erasmus+ conditions

If required, the Erasmus+ coordinator will explain to the contact person, the Erasmus+ conditions for exchange (e.g. the department/faculty does not receive any compensation).

2.2 Process staff agreements

Prior to a mobility, a grant- and mobility Agreement must be filled and signed. The drafted grant and mobility agreements are checked by the Grant Administrator and signed by Grant administrator and/or Erasmus coordinator. After this, they are processed in the EU system, the Beneficiary Module. Here the grant is also calculated, depending on the country and duration of mobility. Note: the calculated scholarship is a concession and does not always cover all the costs of a mobility. Other costs are to be covered by the participant.

2.3 Practical matters incoming staff

If desired, incoming staff can be assisted in finding accommodation, applications for a visa and insurance by the project leader. Outgoing VU staff are expected to make their own preparations for travel, visa and accommodation.

2.3.1 Visa:

- Visa costs are covered by the participant.
- For incoming mobility up to 90 days, participants need to apply for visas themselves. Project leaders can provide an invitation letter if necessary.
- Project leaders can refer to immigration@vu.nl for visa assistance to incoming staff members for mobility starting from 90 days.

3 Financial Roles and Responsibilities

3.1 Head Mobility

Head of International Mobility is ultimately responsible for the budgets. However, the project leader is carrying out the project.

3.2 Erasmus+ Grant administrator

This person is responsible to calculate the individual grants, based on the information in the following documents:

- The Erasmus+ Grant administrators send the mobility agreement and grant agreement to the individual staff participants and /or project leader.
- The Erasmus+ Grant administrators send the Learning agreement and Grant agreement to the individual student participants.

3.3 Erasmus+ Coordinator

- Erasmus+ coordinator will monitor the progress of the mobilities with project leaders. Annual monitoring meetings with the National Agency Erasmus+ and the Erasmus+ coordinator are held to ensure that the budget is used optimally. These usually take place in Spring and Fall, and prior input is requested from the project leaders.
- After 18 months (with a 36-month project duration), an interim report is due which is submitted by the Erasmus+ coordinator. Based on the interim report and progress of the project, the 2nd installment of the grant is transferred by the National Agency to VU Amsterdam.
- The Erasmus+ coordinator and the financial officer check the Erasmus wbs-numbers once per year in November to see if they match the info in the Beneficiary Module.

3.4 Project leader

The project leader is responsible for overall financial management. For each project, SOZ assigns a specific Project number (WBS number) to record all income and expenditure. Project leaders keep track of expenditures per mobility and are responsible for not exceeding the allocated grant amount. In SAP, project leaders themselves approve or reject the invoices that are booked on their project number and via SAC they can also view the expenditures on the WBS number (See separate [SAC manual](#)).

- Project leaders are required to account for all income and expenditure. Therefore, they are advised to use an Excel format supplied by SOZ.
- At the start of the project 80% of the grant is transferred to this WBS number, at the end the remaining 20% will be transferred (or less, depending on the expenditures)

Before mobility

- The project leader needs to approve all individual grant agreements.
- The project leader must inform the participants about the assigned WBS number and the procedure for declaration of costs.

After mobility

Project leaders together with the Erasmus+coordinator collaborate to close the project.

3.5 Outgoing VU staff participant

VU staff are responsible for arranging their own travel, visa, and accommodation.

The project leader is the main point of contact for all information, declarations, and related matters. The instructions below must be followed before any costs can be declared.

3.5.1 Paperwork

Paperwork before mobility

VU Staff need to complete the Mobility agreement and Grant agreement. Both documents need to be sent to Grant Administrator. The Grant administrator will check the documents and enter the mobility in the Beneficiary Module.

Paperwork after mobility

VU Staff need to complete the following 2 documents:

- EU participant survey

At the end of the mobility, the participant will receive a link to the online EU participant survey which must be submitted to complete the online file.

- Certificate of Participation

At the end of the exchange, a certificate of participation must be signed by the host institution, confirming the dates of the exchange. This Certificate of Participation must be sent to the Grant Administrator.

3.5.2 Individual allowance, maximum and process of declaration

- The maximum amount that can be declared is the awarded grant amount mentioned in the grant agreement. Participants are to cover additional costs if the grant amount is exceeded. (Sometimes extra costs can be declared via the faculty/department, participants should discuss this with their supervisors at the faculty /department)
- VU employee declares **the travel grant and individual allowance** via [Reimbursement of expenses for internal employees](#) on the WBS number of the Erasmus+ project (to be requested from project leader)
- Declarations must be submitted via the project leader and must be administered on the correct WBS number

3.6 Incoming staff participant

For incoming staff participants, the project leader is the main point of contact for all information, declarations, and related matters.

The instructions below must be followed before any costs can be declared.

3.6.1 Paperwork

The incoming participant is required to complete the documents mentioned below.

Paperwork before mobility

- VU Staff need to complete the Mobility agreement and Grant agreement. Both documents need to be sent to the Grant Administrator who will process the data in the Beneficiary Module to determine the correct scholarship amount.

Paperwork after mobility

VU Staff need to complete the following 2 documents. Both need to be approved by the project leader and the Grant Administrator.

- EU participant survey

At the end of the mobility, the participant will receive a link to the online EU participant survey which must be submitted to complete the online file

- Certificate of Participation

At the end of the exchange a certificate of participation must be signed by the host institution, confirming the dates of the exchange. This Certificate of Participation must be sent to the Grant Administrator.

Based on the certificate, the final grant is calculated. Therefore, it is important that the dates match the pre-agreed dates in the grant agreement. Should there still be a difference, this may affect on the scholarship awarded.

3.6.2 Individual allowance, maximum and process of declaration

- The maximum amount that can be declared is the awarded grant amount mentioned in the grant agreement. Participants are responsible for extra costs if the grant amount is exceeded.
- Declarations must be submitted via the project leader and must be administered on the correct WBS number

3.6.3 Pre-finance costs

The project leader consults in advance whether the institution and/or traveler can pre-finance the trip itself.

If this is the case:

- upon arrival in the Netherlands the traveler will receive the amount of their travel contribution (see next point: allowance)

If this is not the case:

- Project leader requests tickets from ATPI for the traveler, and costs are invoiced to the WBS number of the project. This is deducted from the individual allowance (which travelers only receive upon arrival)

3.6.4 Other regulations

1. Sometimes travelers do not have their own (or sufficient) insurance: this can be arranged through secretariat SOZ (Bert Haans) or directly via AON. The costs incurred for this (in consultation with the traveler) will also be deducted from their allowance.
2. Sometimes travelers ask for accommodation to be booked by the project leader. The project leader can book the accommodation on the project's WBS number. The costs incurred for this will also be deducted (in consultation with the traveler) from their allowance.
3. Sometimes travelers ask us to
 - a. Arrange airport pick up
 - b. Purchase certain books
 - c. Organize a welcome tour of Amsterdam
 - d. Purchase an OV chipcard

If these activities are coordinated with the traveler in advance, these costs will also be deducted from the allowance.

3.6.5 Additional costs

If the amount of travel and accommodation costs exceeds the amount granted by Erasmus+, the additional costs will be borne by the employee (incoming or outgoing) himself/herself. In consultation with the head of department, additional costs may be covered by ongoing capacity building projects of VU Amsterdam (in the case of CIS) or the relevant Faculty. Should the awarded scholarship exceed the costs incurred, the student/staff may keep the extra scholarship.

4 Student mobilities

These can be both incoming and outgoing students for study and for internship. Grant Administrator gets the email addresses supplied by the project leader who selects and sends the students the appropriate documents. Once the documents are completed, signed and returned, the grant can be calculated through the Beneficiary Module. Grant Administrator enters the student in the Beneficiary

Module and the scholarship in SAP. The student receives 70% of the scholarship upfront and 30% upon completion if all obligations are met and final documents are handed in. It is often more convenient for the incoming students to transfer the scholarship (70%) only once they have opened a bank account in the Netherlands. If it concerns a PhD student, they cannot be paid via SAP and financial officer IO is asked to transfer the amount to the PhD student.

Paperwork before student mobility

Students send the Grant and Learning Agreement to the Grant Administrator who checks whether there is approval for the courses listed on the Learning Agreement (LA) and signs.

Grant Administrator will process the data in the Beneficiary Module to determine the correct scholarship amount, enter the amounts on the Grant Agreement (GA) and sign the GA.

Paperwork after student mobility

Students need to complete the following 4 documents:

- Learning agreement after Mobility
- EU participant survey
We ask the student to complete the online participant survey within 30 days after the last day of the mobility. Tip: some of incoming travelers come from countries where they have poor access to internet, so it is more convenient to do this in the Netherlands.
- Certificate of Participation
At the end of the exchange a certificate of participation must be signed by the host institution, confirming the dates of the exchange.
- Transcript of records

The documents need to be completed online and/or handed in by email to Grant Administrator. Based on the certificate, the final grant is calculated. Therefore, it is important that the dates match the pre-agreed dates in the grant agreement. Should there still be a difference, this may affect the scholarship awarded.

5 During and after mobilities

5.1 Monitoring

Project leaders monitor mobilities in collaboration with the Erasmus+ coordinator. There are monitoring meetings with the National Agency Erasmus+ and the Erasmus+ coordinator to ensure that the budget is used optimally. These usually take place in the spring and fall, so prior input is requested from the project leaders.

Before January 31, the Erasmus+ coordinator will deliver the interim report. In it the status of the projects is reviewed and possibly the 2nd disbursement of the National Agency to VU Amsterdam will be requested.

5.2 Completing CALL KA 171

1. Before the closing date of the current call, all mobilities and required reports/surveys must be entered in the Beneficiary Module.

2. The project leaders, Erasmus+ coordinator and financial officer IO perform a financial check to see if all mobilities are booked correctly on the correct WBS number.
3. Project leaders are asked to provide input for the final report. Deadline: 31 July.
4. Finalize, collect signatures and submit the final report by the Erasmus+ coordinator.
Deadline: August
5. Final award: NA notifies Erasmus+ coordinator of final award.
6. (a) Any remaining budget is transferred back to the EU (finance officer IO).
If more than 80% of the budget is spent, the remaining amount will be credited to the project.

6 Organizational Support (OS)

As of CALL2022, VU Amsterdam will receive €500 for every achieved mobility. From CALL2022, €150 (this is the minimum amount, other arrangements must be discussed with the Erasmus+ coordinator) per mobility will go to the partner institution. From the remaining €350, €200 will be allocated to the department/faculty of the project leader and €150 will be allocated to the Credit Mobility department of the International Office. At the end of the CALL, after receiving the results of the final report and financial settlement for the project (usually around September/October), the Erasmus+ coordinator will make an overview of the OS funds for each partner institution. This overview will be sent to the project leaders so they can arrange the transfer of funds with the VU financial officer by requesting a transfer of the money to each partner via email. In the email to the VU financial officer, they must include the WBS element of the project and bank account details of the partner. The Erasmus+ coordinator will request the financial officer to transfer the remaining OS to department/faculty and IM.

7 Timeline processes

1. Opening of the CALL and application	December-January
2. Budget allocation	Start of the CALL in summer
3. Institutional Agreement	Before 1 st mobility
4. Identifying staff for staff exchange	Start of the CALL onwards
5. Selection of Staff	Start of the CALL onwards
6. Prepare staff exchange	Min. 3 weeks before start of the mobility
7. Process staff agreements	Before start of the mobility
8. Practical matters	Min. 3 weeks before start of the mobility
9. Finance	Before and after mobility
10. Completing exchange	End of the mobility
11. Student exchange	Start of the CALL onwards
12. Interim monitoring	Spring and Fall
13. Completing CALL	31 July for supplying input to Erasmus+ coordinator

8. Contact persons

Erasmus+ coordinator	Monique van Reij internationalrelations@vu.nl
Grant Administrator	Sandra Wensveen erasmus@vu.nl
Financial officer IO	Khalid Fakraoui SOZ.IO.FIN@vu.nl
Head International Mobility	Vanessa Lambrecht (AI) v.t.t.lambrecht@vu.nl

SOZ-secretariat

Bert Haans (insurance for incoming staff)
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