

In this briefing sheet, detail is provided on those areas of the budget that need to be considered, and commented on, when undertaking the assessment of a KA1 Individual Mobility application.

Introduction

Whilst there is no separate award criterion related to budgets or financing, there remains a requirement to review some budgetary aspects as a part of assessing the **Quality of Project Design**.

Under the heading *Quality of Project Design*, experts are required to confirm that the “type, number and duration of mobility activities are appropriate, realistic and match the capacity of the participating organisations” and to ensure that the “project provides good value for money”.

In this respect, experts are required to consider **proposed participant numbers** (often referred to as mobility flows) and to comment, in their assessment, as to whether that these are **realistic and achievable**.

Where a project has the **potential to be funded** (i.e. all thresholds passed with a high score overall), expert comments must be detailed and specific, especially where there are reductions to the proposed mobility flows - in all such cases, the NA will use these comments to make changes to the budget **prior to making an offer** of funding - for example:

- “proposed activities are relevant and convincing and link well with broader institutional development plans, as confirmed by the European Development Plan; however, staff mobilities seem high, when taking into account the overall number of teaching staff within the institution, and related mobility flows should consequently be reduced to a total of 16 teachers across the lifetime of the project” *[good example]*
- “staff mobility flows seem high and could possibly be reduced” *[bad example]*

The majority of budget items for KA1 Individual Mobility are automatically calculated in the online application form: see budget Headings Not for Review (below).

There are, however, two areas of the budget where figures are manually entered and for which experts should directly comment: see Budget Headings for Review (below).

In all cases, comments on budget reductions should also appear in the assessment summary.



Key Action 1:
Individual Mobility

BUDGET
ASSESSMENT

Briefing Sheet
Page 1

Budget Headings Not for Review

For KA1 Individual Mobility, the following budget headings are automatically calculated using unit costs: Travel and Individual Support (including costs associated with Advance Planning Visits in the field of VET); Organisational Support; Linguistic Support (VET only) and Course Fees (SE and AE only). In these cases, experts are not required to comment unless they are proposing changes to the proposed mobility flows.

Budget Headings for Review

For KA1 Individual Mobility, there are two budget headings for which budgetary data is manually entered, requiring that experts confirm, in their assessment, the **relevance, acceptability and suitability** of the proposed budget items. In this respect, it is important to consider what the applicant should know (based on information provided to all applicants) and what you, as experts, need to consider in your assessment (scores and comments).

Budget Heading	What the Applicant Should Know	What the Assessor Should Consider
Special Needs Support	<ul style="list-style-type: none"> ☞ Costs must relate to participants with a “disability” or whose “physical, mental or health-related situation” is such that project participation would not be possible without extra financial support; this can also include costs for accompanying persons. ☞ Actual costs should be submitted in the application form - based on forecasts for additional expenditure - and will be assessed on a case-by-case basis. 	<ul style="list-style-type: none"> ☞ The situation is well described including in terms of the “special needs” of one or more participants and the additional costs needed to enable their participation in the project. ☞ Costs relate to clearly-defined project activities. ☞ Costs are complementary to (and not duplicates of) those already requested under travel and individual support.

<p>Exceptional Costs</p>	<ul style="list-style-type: none">☞ Costs tied to the participation of learners with fewer opportunities (VET mobility only) can be funded at 100% of their actual value.☞ Costs for financial guarantees, where requested by the National Agency, can be included under this heading and will be funded at 75%.☞ Costs to cover expensive travel costs for participants can be funded at up to 80% of eligible costs (only allowed where applicants can justify that standard funding rules - based on unit costs and travel distance bands - do not cover at least 70% of participant travel costs.	<ul style="list-style-type: none">☞ Costs relating to the participation of learners with fewer opportunities (VET mobility only) relate to clearly defined project activities.☞ Costs do not appear excessive or unrealistic and the required insight is given into the need for exceptional travel costs.
--------------------------	---	---