



EDUCATION AND CULTURE

LEONARDO DA VINCI

Community Vocational Training Action Programme

Second phase: 2000 - 2006

GENERAL GUIDE FOR PROJECT PROMOTERS

Version 2005

EUROPEAN COMMISSION

The Leonardo da Vinci Community vocational training action programme, established in 1994, has now reached the third and concluding stage of its second phase, scheduled to run from 1 January 2000 to 31 December 2006.

Promoting a "Europe of knowledge" is central to the implementation of the programme, which seeks to consolidate a European co-operation area for education and training.

The programme actively supports the lifelong training policies conducted by the Member States. It supports innovative transnational initiatives for promoting the knowledge, aptitudes and skills necessary for successful integration into working life and the full exercise of citizenship, and affords scope for links with other Community initiatives - particularly the Socrates and Youth programmes - by supporting joint actions.

The broad lines of this second phase are set out in the Council Decision of 26 April 1999 (OJ L146 of 11 June 1999), which affirms the need to develop quality, innovation and the European dimension in vocational training systems and practices through transnational co-operation.

Multi-annual Community calls for proposals have been launched for the periods 2000-2002, 2003-2004 and, finally, 2005-2006. The calls set up the annual deadlines for the submission and selection of proposals and specify particularly the priorities for these calls.

A set of documents is available to promoters who wish to submit a proposal under the Leonardo da Vinci programme. They are:

- *the Council Decision;*
- *the current call for proposals;*
- *the general guide for promoters;*
- *the five specific guides, each dealing with one of the individual measures: mobility, pilot projects, promotion of language competencies, transnational networks and reference material;*
- *the application forms;*
- *the administrative and financial handbooks.*

This guide gives a general description of the programme and explains how to submit proposals under the terms of the Council Decision. It must be read in conjunction with the specific guide concerning the measure to which the proposal relates.

For further information, contact your National Agency or contact the relevant Commission Services (see annexes 6 and 7).

TABLE OF CONTENTS

	Page
TABLE OF CONTENTS	3
I. WHAT IS THE LEONARDO DA VINCI PROGRAMME?	5
I.1 BACKGROUND.....	5
I.2 OBJECTIVES	5
I.3 TRANSNATIONALITY.....	6
II. WHAT MEASURES DOES THE PROGRAMME PROVIDE FOR?	6
II.1 MOBILITY	6
II.2 PILOT PROJECTS	7
II.3 LANGUAGE COMPETENCIES.....	7
II.4 TRANSNATIONAL NETWORKS.....	7
II.5 REFERENCE MATERIAL	8
II.6 SPECIFIC CASES.....	8
II.6.1 Combined proposals.....	8
II.6.2 Proposals based on the results of previous projects	8
II.6.3 For Mobility projects only.....	8
III. WHAT ARE THE MAIN RULES OF THE PROGRAMME?	8
III.1 DURATION OF THE PROJECTS	9
III.2 COMMUNITY FINANCIAL SUPPORT	9
IV. WHO CAN TAKE PART IN THE PROGRAMME?	10
IV.1 PARTICIPATING COUNTRIES	10
IV.2 POTENTIAL PROMOTERS.....	10
V. WHEN AND HOW SHOULD PROPOSALS BE SUBMITTED?	11
VI. WITH WHAT CRITERIA MUST THE PROPOSAL COMPLY?	11
VI. 1 ELIGIBILITY CRITERIA.....	12
VI.1.1 Compliance with the deadlines set out in the calls for proposals	122
VI.1.2 Compliance with the transnational dimension and with the minimum size of the partnership.....	12
VI.1.3 Compliance with the administrative rules.....	12
VI. 2 “SELECTION CRITERIA”: CRITERIA RELATING TO THE PROMOTER’S FINANCIAL AND OPERATIONAL CAPACITY	13
VI. 3 “GRANT AWARDING CRITERIA”: QUALITY CRITERIA APPLICABLE TO THE PROPOSAL	15
VI. 3.1 General criteria applicable to pre-proposals and full proposals	15
VI. 3.2 General criteria only applicable to full proposals.....	15
VII. WHAT ARE THE SELECTION PROCEDURES?	18
VII.1 THE VARIOUS TYPES OF PROCEDURE	18
VII.2 THE VARIOUS ELEMENTS OF PRE-PROPOSALS AND FULL PROPOSALS (PROCEDURES B AND C)	21
The pre-proposal	21
The full proposal	21
VIII. WHAT HAPPENS AFTER SELECTION?	22
VIII.1 INFORMING PROMOTERS	22
VIII.2 CHECKS PRIOR TO CONTRACTUALISATION	22
VIII.3 CONTRACTUALISATION PROCESS	22
VIII.4 PROJECT IMPLEMENTATION MONITORING.....	23
VIII.5 FINAL REPORTS	23
VIII.6 LIFECYCLE OF A PROJECT SELECTED UNDER PROCEDURE A	25
VIII. 7 LIFE CYCLE OF A PROJECT SELECTED UNDER PROCEDURE B.....	27
VIII.8 LIFE CYCLE OF A PROJECT SELECTED UNDER PROCEDURE C	29

IX. ANNEXES.....	31
ANNEX 1 – SCOPE OF THE PROGRAMME - DEFINITIONS	31
ANNEX 2 – TERMINOLOGY	33
ANNEX 3 - MAIN FINANCIAL RULES APPLICABLE TO THE PROJECTS.....	35
ANNEX 4 – THE ROLE OF THE DIFFERENT INSTITUTIONAL PLAYERS IN PROGRAMME MANAGEMENT	37
ANNEX 5 – THE VALORISATION PLAN - GUIDELINES FOR PROJECT PROMOTERS.....	38
ANNEX 6 – INFORMATION SOURCES	44
ANNEX 7 - LIST OF NATIONAL AGENCIES.....	45

I. WHAT IS THE LEONARDO DA VINCI PROGRAMME?¹

1.1 Background

The second phase of the Leonardo da Vinci programme is a seamless continuation of Community action that has been undertaken for twenty years in the vocational training field.

Following-on directly from the aims laid down for the first phase of the programme, this second phase seeks to support and supplement action taken by the Member States, while fully respecting their responsibility for the content and organisation of vocational training, and their cultural and linguistic diversity. It does this by supporting transnational co-operation projects in the field of vocational training.

There are other Community programmes and initiatives which provide support for projects in associated fields². The Commission and the Member States are mindful of the need to ensure the consistency and complementarity between the Leonardo da Vinci programme and these related programmes; they also have regard to the priorities set out in the employment guidelines. The Commission, in partnership with the Community social partners, is making efforts to develop co-ordination with the European social dialogue including efforts at sectoral level.

1.2 Objectives

The programme has three general objectives:

- A. to improve the skills and competencies of people, especially young people, in initial vocational training at all levels; this may be achieved inter alia through work-linked vocational training and apprenticeship with a view to promoting employability and facilitating vocational integration and reintegration;
- B. to improve the quality of, and access to, continuing vocational training and the lifelong acquisition of skills and competencies with a view to increasing and developing adaptability, particularly in order to consolidate technological and organisational change;
- C. to promote and reinforce the contribution of vocational training to the process of innovation, with a view to improving competitiveness and entrepreneurship, also in view of new employment possibilities; special attention will be paid in this respect to fostering co-operation between vocational training institutions, including universities and undertakings, particularly SMEs.

Under the first two objectives, innovative counselling and guidance approaches are of particular importance.

In implementing the three objectives, special attention will be given to proposals addressing:

- the development of practices to facilitate access to training for people most at a disadvantage in the labour market, including disabled people;
- equal opportunities for women and men, with a view to combating discrimination in training provision.

For the realisation of the programme's objectives, calls for proposals are published which set out specific **priorities**. As regards, in particular, Call for proposals 2005-2006, the following priorities are established (they are applicable to all measures but Thematic actions):

1. Promoting transparency of qualifications
2. Developing the quality in VET systems and practices

¹ See Annexes 1 and 2: "Scope of the programme-definitions" and "Terminology".

² For further information about the Socrates and Youth Programmes, please consult the following Web address: http://europa.eu.int/comm/education/index_en.html; for other Community initiatives, such as the European Social Fund, etc., please consult the Web address: http://europa.eu.int/comm/dgs/employment_social/index_en.htm.

3. Developing relevant and innovative E-learning content
4. Continuous training of teachers and trainers.

For more information, please refer to the text of the current Call, available in the Leonardo da Vinci Website at the following address: http://www.europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html

1.3 Transnationality

Proposals submitted under the Leonardo da Vinci programme must be designed and implemented in line with the programme objectives and with the involvement of partners³ from several participating countries (and must comply with the formal eligibility conditions set out in section VI). The underlying aim is to stimulate joint work into new approaches to training and new ways of acquiring knowledge and skills, at the same time focusing on the exchange and transfer of good practices and innovation in training.

II. WHAT MEASURES DOES THE PROGRAMME PROVIDE FOR?

The second phase of the Leonardo da Vinci programme makes provision for five types of measures which can qualify for Community support:

- mobility
- pilot projects, including "thematic actions"
- language competencies
- transnational networks
- reference material

NB: The programme does not usually fund training provision except for experimental applications to test the new methods and products developed in the context of pilot projects and language competence projects.⁴

There is also special provision for "joint actions" with related Community programmes, particularly the Socrates and Youth programmes. Separate, specific calls for proposals will be launched for such joint actions.

This guide gives a brief review of the content of the various measures. More details on each measure are set out in the specific guides. These guides are available on the Leonardo da Vinci Website at the following address: http://www.europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html

II.1 Mobility

Proposals submitted under this heading must relate to transnational mobility actions for people in training, more especially young people undergoing training or endeavouring to enter the labour market, young employed workers or job seekers, recent graduates, students registered in higher education establishments (projects referred to as "placements"). They may also be aimed at trainers or human resources managers and training scheme managers, at language specialists and at social partners (projects referred to as "exchanges").

The basic point here is to strengthen the European dimension of initial and continuing vocational training, to encourage people to gain experience in activities involving theory and practice, particularly work-linked training, to develop language skills and transnational contacts and exchanges of good practices for trainers and human resources managers.

3 See Annex 2 - "Terminology".

4 Such testing activity should only be one phase of the project.

This type of measure is also useful in consolidating transnational co-operation in a broad sense, bringing in all actors on the vocational training scene. It is also a good way of strengthening the links between working life and training.

The actual implementation takes the form of three main types of action, according to the type of beneficiaries involved:

- transnational placement projects,
- transnational exchange projects, and
- study visits, organised by Cedefop (which have a special status, see Guide on Mobility).

Mobility projects are implemented on a decentralised basis, i.e. proposals are submitted to the National Agency of the country of the promoter.⁵

II.2 Pilot projects

Community support is available for the design, development, testing, evaluation and dissemination of innovative practices in terms of methods, content or products in the field of vocational training and guidance.

Pilot projects are intended to stimulate the process of innovation and to enhance the quality of training and vocational guidance. They must develop tangible products, using new information and communication technologies where appropriate.

Under this measure, special support will be given to a small number of projects, known as “thematic actions”, on themes of particular interest at Community level. These themes will be indicated in the Community calls for proposals. For Call for proposals 2005-2006 two specific themes are retained: “credit transfer in VET” and “validation of non-formal and informal learning”. For more information, please refer to the text of the current Call, available in the Leonardo da Vinci Website indicated above.

II.3 Language competencies

These proposals are concerned with promoting language and cultural competencies in a vocational training context including projects on less widely used and taught languages.

Proposals may be concerned with designing, testing and validating, assessing and disseminating teaching material, as well as with innovative teaching methods tailored to the specific needs of different occupational and economic sectors. They may also cover the development of language audits and innovatory pedagogical approaches based on language self-tuition and the dissemination of the results.

II.4 Transnational networks

The programme supports transnational networks of European expertise and dissemination. These networks undertake three functions:

- assembling, distilling and building on European expertise and innovatory approaches;
- improving the analysis and anticipation of occupational skills requirements;
- disseminating the networks outputs and project results throughout the Union in the appropriate circles.

⁵ See infra point VIII.1

II.5 Reference material

Community support is available for the creation and updating of Community reference material, more especially for surveys and analyses, the creation and updating of comparable data, the observation and dissemination of good practice, and the exhaustive exchange of information.

On a given theme, it is the purpose of such reference material to make it possible at Community level to record the specific characteristics and changes in national vocational training systems.

Projects aimed at the creation and updating of comparable data (statistical projects) will be the subject of a specific call for proposals, which will be published as soon as a biennial statistical programme has been defined and published.

II.6 Specific cases

II.6.1 Combined proposals

Proposals under the same or different measures may be combined with each other with a view to developing synergies and enhancing their potential impact. Proposals can only be combined within the same year of selection. However, promoters should submit separate proposals and indicate clearly their interdependence in the relevant section of the application forms.

II.6.2 Proposals based on the results of previous projects

For Pilot projects (including Thematic actions), Languages competencies, Transnational networks and Reference material, proposals can be submitted which are based on the results of one or more projects developed under the Leonardo da Vinci or Socrates programme, other Community programmes/initiatives (including Phare) or local/regional/national initiatives. In the application form, promoters shall provide precise information about the reasons why they wish to develop this or these project(s) and demonstrate the added value of the proposal compared to the previous project(s).

II.6.3 For Mobility projects only

Proposals aimed at ensuring reciprocity

According to the general rule, a mobility project (both placements and exchanges) can only include “outgoing” beneficiaries (i.e. sent to one or more host organisations abroad). Therefore the promoter (and its partners from the same country, if any) can only act as a sending organisation.

In this context, reciprocity between sending organisations and host organisations will be ensured by submitting two (or more) separate applications, to be made by each promoter to the National Agency in its own country; each promoter will act as host organisation within the other(s) proposal(s). Proposals which are so related must refer to this relation in the relevant section of the Application form for Mobility. For more details, please refer to the specific Guide on Mobility.

A special case: “receiving foreign students”

With the agreement of the Commission, some countries have chosen to deviate from the general rule referred to above. As regards one particular type of beneficiary, i.e. students, these countries allow financing of incoming beneficiaries, too. Therefore, it will be possible to receive foreign students and send students abroad within the same Mobility project. General conditions for implementation of this exception are explained more in detail in the Guide on Mobility. Promoters should contact the relevant National Agency to confirm that this arrangement exists in their country.

III. WHAT ARE THE MAIN RULES OF THE PROGRAMME?

III.1 Duration of the projects

The duration for Community support will depend on the type of measure. It should be noted that **the project must be completed within the maximum duration of the Community support.**

As stated in the Council Decision establishing the programme, projects under the Mobility measure may have a maximum duration of 2 years. Taking into account the approaching end of the current programme, projects referring to the other measures: Pilot Projects, including Thematic Actions, Language Competences, Transnational Networks and Reference Materials will also be limited to a maximum duration of 2 years.

Conditions applying to each measure are summarised below.

Measures	Maximum duration	
	Of the project	Of each placement or exchange
Mobility		
➤ Placements	2 years	
- Persons undergoing initial training		3 weeks to 9 months
- Students in higher education		3 to 12 months
- Young workers and recent graduates		2 to 12 months
➤ Exchanges	2 years	1 to 6 weeks
Pilot projects	2 years	
Language competencies	2 years	
Transnational networks	2 years	
Reference material	2 years	

III.2 Community financial support

The Community's financial contribution to projects may not exceed a certain part of the eligible costs. **Co-financing is, therefore, the core principle of the programme.** The **main reason** [principle] behind this is that a partnership contributing a certain proportion of the funding will demonstrate commitment and credibility. Depending on the type of project, this contribution may not exceed the following amounts:

Measures	Maximum financial contribution in % of the total eligible costs	Ceiling of Community financial support per year and per project (Euro)
Mobility	<i>n.a.</i>	5 000 per beneficiary and per placement or exchange ⁶
Pilot projects	75 %	200 000
➤ of which: thematic actions		300 000
Language competencies	75 %	200 000
Transnational networks	50 %	150 000
Reference material	50-100 %	200 000 (Up to 300 000 possible)

⁶ The maximum amount of this contribution corresponds to the maximum duration of the placement or of the exchange. It may be increased for disabled participants.

Costs which are not covered by the Community contribution under the Leonardo da Vinci programme must be covered from other non-Community sources (i.e. private, public, partnership resources or a combination of these)⁷.

Dual funding is forbidden. The project **promoters** and **partners** may not apply, under any circumstances, for Community funding for the same project under Leonardo da Vinci or any other Community programme or initiative, except under particular conditions established for the specific joint actions. **In the same way, the project promoter/partners may not apply more than once within the same selection year for Leonardo da Vinci funding for the same project, regardless of the procedure and the body to which the proposal is submitted; and the same project cannot be financed more than once by the Leonardo da Vinci programme.**

IV. WHO CAN TAKE PART IN THE PROGRAMME?

IV.1 Participating countries

The Leonardo da Vinci programme is open to a wide range of European countries. The following countries can participate:

- all Member States of the European Union (Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, United Kingdom);
- the EFTA⁸ countries which are members of the EEA: Iceland, Liechtenstein and Norway under the terms of the EEA agreement;
- the candidate countries to the European Union: Bulgaria, Romania and Turkey.⁹

IV.2 Potential promoters

Proposals may be submitted by private, public or semi-public organisations and institutions involved in vocational training (i.e. **private individuals may not submit proposals**). Potential promoters will therefore include:

- establishments or training organisations, including universities, which, in accordance with national laws and/or practices, design or undertake vocational training, further vocational training, refresher vocational training or retraining, irrespective of what they may be called in the participating countries;
- research centres and organisations responsible for vocational training surveys and analyses;
- undertakings, particularly SMEs, and the craft trade sector, or private or public firms, including businesses active in the vocational training field;
- professional organisations, including chambers of commerce etc;
- the social partners;
- local and regional bodies and organisations;
- non-profit associations, voluntary organisations and non-governmental organisations (NGOs).

⁷ These conditions may be different for the pre-accession countries. An exception to the general rule might be considered for mobility. Please contact your country's Leonardo da Vinci National Agency for more information.

⁸ European Free Trade Association

⁹ For details on the conditions of participation, please contact your country's Leonardo da Vinci National Agency or the relevant Commission Services (see Annexes 6 and 7).

V. WHEN AND HOW SHOULD PROPOSALS BE SUBMITTED?

The annual deadlines for the submission of pre-proposals and full proposals¹⁰ are laid down in the Community calls for proposals. Promoters may present their proposals in any year, provided they are in compliance with the deadlines set in the appropriate calls. In addition to these deadlines, participating countries may establish, for each selection year, further deadlines for the Mobility measure.

Calls for proposals are organised at Community level and published in the Official Journal of the European Communities. In addition to the deadlines for submission and selection of proposals, the calls also describe the programme priorities for the period in question and operational arrangements.

Promoters wishing to submit a proposal have to complete the specific Leonardo da Vinci application form. There is one application form for the mobility measure, and one for the remaining measures (pilot projects, thematic actions, language competencies, transnational networks and reference material).

These forms are available on the Leonardo da Vinci Website at the following address:
http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html

There are two possible ways of filling in the application form available at the above-mentioned address:

- by downloading the Word version,
- by encoding the proposal **on line** through the Leonardo da Vinci Web tool (<http://leonardo.cec.eu.int/>)

After having been printed, proposals have to be mailed (postmarked) in paper version to the National Agency and/or the European Commission according to the applicable procedure (see chapter VIII, which also specifies when and where copies are needed).

Please note that only the paper version of the proposal is legally binding. For instance, even if it is possible for promoters to submit their proposals electronically from the Leonardo Web tool, they are required nevertheless to send the paper version to the appropriate bodies before the scheduled deadlines.

Addresses of National Agencies and of the Commission are mentioned in annex and in the call for proposals or can be found on the Leonardo da Vinci Website:

http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html

It is strongly recommended that promoters use the online application form since this procedure will enable faster treatment by the National Agencies and/or the Commission at the time of the evaluation and selection of proposals, as well as at the time of contractualisation and monitoring of selected projects, where appropriate.

Where the promoter has not submitted his proposal on-line, the promoter is requested to send, by email, a Word file of his proposal to the National Agency and/or the Commission (this should take into account the dates given in Chapter XIII of the 2005-2006 Call for Proposals). This Word document sent by email must be accompanied by a declaration, which attests to the fact that the Word document attached to the email is identical to the paper version sent by post.

VI. WITH WHAT CRITERIA MUST THE PROPOSAL COMPLY?

VI. 1 Eligibility criteria

¹⁰ The term "proposal" is the generic one covering both "pre-proposals" and "full proposals". For more information on this, see Annex 2 "Terminology".

To be eligible, proposals must meet a number of formal conditions, which are described briefly below. **Only proposals, which meet all the formal eligibility conditions, go forward for quality evaluation.**

VI.1.1 Compliance with the deadlines set out in the calls for proposals

Proposals submitted must comply with the annual deadlines set in the Community calls for proposals (and by additional national Calls, if any, in the case of Mobility projects).

VI.1.2 Compliance with the transnational dimension and with the minimum size of the partnership

Proposals must be submitted by a transnational partnership involving partners from **at least three participating countries, one of which must be from a Member State of the European Union**, with the exception of the "mobility" and "language competences" measures. In both the latter cases, the partnership must comprise partners from **at least two participating countries, one of which must be from a Member State of the European Union.**

VI.1.3 Compliance with the administrative rules

- Any proposal (i.e. pre-proposal and full proposal¹¹) must:
 - be submitted by a private, public or semi-public promoting organisation (**promoter**¹²) on behalf of the co-signatory partners
 - be drawn up in one of the official languages of the European Union¹³. Promoters are nevertheless strongly encouraged to submit proposals in the language used in the partnership for the preparation of the proposal and which will be used for the implementation of the work programme;
 - bear the original signature¹⁴ of an authorised person;
 - be submitted exclusively using the official Leonardo da Vinci Application form corresponding to the appropriate selection year¹⁵ (available on the Leonardo da Vinci Website);
 - be sent to the exact address(es) specified in the current call for proposals.

- Every proposal must be accompanied by a declaration of honour¹⁶ signed by the authorised signatory in which the latter certifies:
 - that the promoting organisation:
 - a) is not bankrupt, being wound up, or having its affairs administered by the courts, has not entered into an arrangement with creditors, has not suspended business activities, is not the subject of proceedings concerning such matters, nor, in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
 - b) has not been convicted of an offence concerning its professional conduct by a judgment which has the force of 'res judicata';

11 Proposal for the Mobility measure

12 See Annex 2 "Terminology".

13 With the exception of mobility proposals submitted in the EFTA/EEA and candidate countries to the European Union. These proposals can be drafted using the national language and must have a compulsory Summary in German, English or French.

14 The certified true copy of a signature will not be accepted.

15 As an example, a proposal submitted with a view to participation in selection year "n" should be drafted using the "n" version application form.

16 This declaration is inserted in the application form.

- c) has not been found guilty of grave professional misconduct stated by any means that the contracting authority may justify;
 - d) has fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which the organisation is established or with those of the country of the contracting authority or even with those of the country where the contract will be implemented;
 - e) has not been the subject of a judgment which has the force of 'res judicata' for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
 - f) following another procurement procedure or grant award procedure financed by the Community budget, has not been declared to be in serious breach of contract for failure to comply with its contractual obligations;
 - g) is not subject to a conflict of interest (for family, personal or political reason or through national, economic or any other interest shared with an organisation or an individual directly or indirectly involved in the selection or the contracting of the proposal);
 - h) is not guilty of misrepresentation in supplying the information required by the European Commission as part of proposal selection and has not failed to provide the requested information.
- that the promoting organisation has the financial and operational capacity for successfully implementing the submitted proposal.
- Every pre-proposal¹⁷ must indicate the global cost estimate of the project.
 - Every full proposal (including Mobility proposals) must include:
 - a detailed budget;
 - letters of intent¹⁸, corresponding at least to the obligatory¹⁹ minimum number of partners (does not apply to pre-proposals).

VI. 2 "Selection criteria": criteria relating to the promoter's financial and operational capacity

These criteria only apply to **mobility proposals** and to **full proposals submitted under procedures B and C**.

The selection criteria make it possible to assess the promoter's financial and operational capacity to carry out the work programme and to make sure that the promoter has sufficient and stable financial sources to continue the activities throughout the project and assure its co-financing²⁰.

For this purpose, every promoter must submit the following documents:

17 Only concerns procedures B and C.

18 See Annex 2 "Terminology".

19 As far as letters of intent are concerned, if these were already enclosed with the pre-proposal, the full proposal will be considered eligible if it includes **copies** of the letters of intent previously sent. If, however, changes have occurred among the partners forming the minimum partnership, since the pre-proposal, then **new letters** of intent **must** be sent with the full proposal. New letters will thus be necessary, for example, if changes occur in the role and/or the financial contribution of one of the original partners or if a partner should be replaced.

The originals of the letters are not compulsory when submitting a proposal and therefore copies and faxes will be accepted. Nevertheless, if a proposal is selected, the promoter will be asked to provide the originals before signing the contract.

Without prejudice to the previously mentioned eligibility condition, proposals accompanied by letters of intent from **all the partners** will be more favourably assessed at the time of qualitative evaluation.

20 This is due to the fact that Community financial assistance likely to be awarded to selected projects is awarded in the form of grants.

- documents on the Legal Entity of the promoter:
 - for private companies, associations, etc.:
 - the specific Legal Entity Form²¹ duly completed and signed by an authorised person;
 - a copy of any official document (e.g. official journal, register of companies, etc.) showing the contractor's name and address and the registration number given to it by the National authorities;
 - a copy of the VAT registration document if applicable and if the VAT number does not appear on the official document referred to above;
 - for public organisations:²²
 - the specific Legal Entity Form²³ duly completed and signed by an authorised person;
 - copy of the resolution, law, decree or decision establishing the entity in question or, failing that, any other official document attesting to the establishment of the entity;
- the official annual accounts for the previous three financial years²⁴. Public organisations²⁵ are exempted from fulfilling this obligation;
- when the application for Community financial support exceeds 300,000 euro, the promoter must include an external audit report produced by an accredited auditor with the application. This report must certify the accounts of the last available financial year and provide an assessment of the promoting organisation's financial viability. Public organisations²⁶ are exempted from fulfilling this obligation;
- CVs of the key persons in the partnership, giving detail of the relevant professional experience;
- the financial identification form²⁷ completed by the promoter and certified by the bank (original signature as required). This account must be held in one of the countries participating in the programme.

These documents must be transmitted with the original of the proposal only. It is not necessary to include them with the various copies of the proposal requested.

Furthermore, the Commission or the National Agencies may also ask promoters for additional information, at any time. Such information may include, in particular, one or more of the following items:

- a guarantee, which may take the form of a bank guarantee, corresponding to all or part of the requested funding;
- an explicit commitment by each organisation participating in the financing of the project in question for the amount declared in the funding application;
- an explicit declaration by the promoters in which they undertake to provide their share of the financing and, if necessary, the financing of expenditure which might not be covered by Community funding if the other organisations should fail to take part in financing.

VI. 3 "Grant awarding criteria": quality criteria applicable to the proposal

²¹ This Legal Entity Form is inserted in the application form as Section A.4.

²² Including secondary and higher education institutions.

²³ This Legal Entity Form is inserted in the application form as Section A.4.

²⁴ "Official" means accounts certified by an appropriate external body and/or published and/or approved by the organisation's general meeting.

²⁵ Including secondary and higher education institutions.

²⁶ Including secondary and higher education institutions.

²⁷ The financial identification form is inserted in the application form as Section A.5.

VI. 3.1 General criteria applicable to pre-proposals and full proposals

VI. 3.1.1 Community added-value:

Proposals should demonstrate their transnational nature and their added value for national vocational training policies and practices. Proposals should provide a clear rationale as to why a Leonardo da Vinci project is the best means of addressing the training need or problem they have identified, and how Leonardo da Vinci funding will be used to develop or disseminate innovative training approaches, or to improve the skills and employability of beneficiaries/target groups²⁸.

Proposals should emphasise their innovative character, which, for example, may lie in new approaches to the use of existing methods, instruments or products so as to apply them to new themes and/or target groups, new products in response to existing problems, new forms of co-operation/networking between partner organisations and/or political decision makers.

VI. 3.1.2 A multi-player partnership:

The Leonardo da Vinci programme is open to any type of organisation involved in vocational training. Priority is given to transnational partnerships, which involve a variety of players capable of contributing significantly to the proposal's objectives.

Particular attention will also be given to partnerships, which seek to strengthen co-operation between training organisations (including universities and vocational colleges) and enterprises (including SMEs) or which involve the social partners and local authorities.

VI. 3.1.3 Equal opportunities:

Promoters should aim to apply equal opportunities at all stages of their projects (design, implementation and evaluation of activities).

In particular, proposals should consider how they would promote equal opportunities for men and women in training.

Moreover, special attention will be given to proposals which aim to meet the training needs of people at risk of exclusion from the labour market.

VI. 3.1.4 Valorisation plan:

Pre-proposals must contain a general outline on how promoters intend to disseminate and make expected results exploited by final and potential beneficiaries during and after project's life.

VI. 3.2 General criteria only applicable to full proposals

VI. 3.2.1 Work programme quality

The work programme is an essential element of full proposals. It must present the activities of each work-package, the partners involved and their role, the time devoted to each activity together with the corresponding resources and the interim and final results in a clear and detailed way. The work programme must take into account the involvement of the users²⁹ of the project's results. It must also provide for evaluation and, where

28 See Annex 2 "Terminology"

29 See Annex 2 "Terminology".

appropriate, testing activities with the target group(s) of the project, so as to ensure that the content/media and results sufficiently match the needs of the target group(s) and/or target sector(s). It must include a quality management plan and a dissemination strategy.

VI. 3.2.2 Quality management plan

Quality management, which includes evaluation and quality assurance, needs to be planned in the same way as any other key element of project work.

It must be given equal importance at every stage of the project (design, implementation and evaluation of results, their impact and of their transfer potential). All partners must integrate evaluation and quality assurance into their respective tasks or work programme.

In quality management activities, the proposal shall rely on the direct involvement of potential users of project's results and/or target publics concerned and/or representatives of the economic or professional sectors concerned.

VI. 3.2.3 Valorisation plan (= dissemination + exploitation of results)

In order to take full advantage of the results of the projects funded by the Leonardo da Vinci Programme, (whatever the kind of results expected - approaches, methods, products or good practices), any full-proposal must include a clear, detailed and quantified valorisation plan³⁰. This will form one of the essential elements of the evaluation of proposals. Consequently, a poor-quality valorisation strategy will strongly affect the proposal evaluation.

A good valorisation plan should contain the following points in particular:

A shared responsibility

The main responsibility for valorisation lies with the partnership as the repository/owner of those results. The members of the partnership are required to take an active part under a clearly defined valorisation strategy, which is geared to the target group(s) and to the target sector(s) concerned by the project, as well as to the final and potential users of its results.

There must be a timetable for such valorisation activities, and part of the budget must be reserved for this purpose.

A continuing process

Valorisation should not be considered as the last phase of the project but should be conceived and planned from the very outset and ideally not stop at the end of the project. As soon as the partnership is set up, it is useful to pinpoint those members that can contribute particularly effectively to the valorisation of results. It is also useful to combine partners from different professional sectors and institutions and which represent potential users of the project results. Furthermore, it is useful to actively involve final users in the project and associate organisations specialising in the areas of information and marketing with the partnership.

Valorisation is not restricted to the final phase of the project, but is an ongoing process taking place throughout the project, which may continue beyond the life of the project itself in order to make project's results sustainable (= actively used inside training systems and practices also after the end of the project)

Valorisation implemented in the course of the project, associated with activities to evaluate and, where appropriate, test the interim and final results of the project, represents a valuable management tool making it

³⁰ See specific guidelines on the valorisation plan included as Annex 5.

possible to compare ongoing achievements with the needs of the target groups, to validate them or, alternatively, to show the need to improve them.

VII. WHAT ARE THE SELECTION PROCEDURES?³¹

Proposals submitted under the Community calls for proposals are selected by three types of procedure, known as A, B and C, depending on which measure is under consideration.

VII.1 The various types of procedure

PROCEDURE A

Applicable to Mobility

- *Promoters* must submit their proposal for placements or exchange projects to their country's **National Agency** (NA) (see list of addresses in Annex 7). This must be done according to the priorities and rules set out in the Community calls for proposals published in the Official Journal of the European Communities.
- The **National Agency** receives the proposals and organises the evaluation procedure according to the formal eligibility conditions and qualitative criteria set out at Community level.
- The **National Agency**, in co-operation with the competent national authority, draws up a list of the successful placement or exchange projects. It sends a list of the selected projects to the other National Agencies and to the Commission.
- The **National Agency** communicates the result of the selection procedure to the promoters and draws up contracts with promoters whose proposals have been accepted.

31 For more details on the way the programme is managed and organised, see Annex 4 "The role of the different institutional players in programme management".

PROCEDURE B

Applicable to:

- Pilot projects (with the exception of “Thematic actions”)
- Language competencies
- Transnational networks

Procedure B comprises two stages:

- Stage 1 – Presentation and selection of pre-proposals
- Stage 2 – Presentation and selection of full proposals

The selection of pre-proposals must be finished within **two months** of the final date for the submission of pre-proposals, as laid down in the Community calls for proposals. Selection of full proposals takes place within **five months** of the final date for submission of full proposals, as laid down in the Community calls.

STAGE 1

- *Promoters* must submit their pre-proposal to their country's **National Agency**, bearing in mind the priorities and rules laid down in the Community call for proposals.
- The **National Agency**, in co-operation with the competent national authority, evaluates pre-proposals and communicates the results to promoters, while suggesting possible improvements to their pre-proposals. Only promoters who have submitted successful pre-proposals are invited to submit a full proposal.

STAGE 2

- *Promoters* of successful pre-proposals submit their full proposals to their **National Agency** and send a copy to the Commission before the same deadline.
- The **National Agency**, in co-operation with the competent national authority, evaluates full proposals and draws up a descriptive and reasoned list of proposals likely to be approved. This list, along with the report on the pre-proposal and full proposal evaluation procedure, is sent to the Commission.
- The **Commission**, with the assistance of independent experts, evaluates full proposals with a view to assessing their transnational and innovative nature.
- The **Commission** examines the national reports and consults accordingly with each participating country.
- For full proposals likely to be approved, the **Commission**, in co-operation with **National Agencies** and on the basis of the evaluations carried out at national and Community level, draws up the eligible ex-ante budget appropriate for each proposal, as well as the amount of the corresponding Community contribution.
- The **Commission** submits to the Committee, for its opinion, a proposed selection list based on national and Community evaluations, together with a proposed breakdown of the budget resources by measure and by participating country.
- After receiving the Committee's opinion, the **Commission** draws up the definitive list of selected projects for each participating country and allocates the funds assigned to the implementation of the selected proposals to each country.
- **National Agencies** inform promoters of the final decision and draws up contracts with promoters whose proposals have been accepted.

PROCEDURE C

Applicable to:

- Reference material
- Thematic actions
- Proposals submitted by European organisations³² (Pilot Projects, Transnational Networks, Language Competencies, Thematic Actions, Reference Materials)

Procedure C comprises two stages:

- **Stage 1** – Presentation and selection of pre-proposals
- **Stage 2** – Presentation and selection of full proposals

The selection of pre-proposals must be finished within **three months** of the final date for the submission of pre-proposals as laid down in the Community calls for proposals. Selection of full proposals takes place within **five months** of the final date for submission of full proposals, as laid down in the Community calls.

STAGE 1

- **Promoters** submit their pre-proposal to the **Commission**, with a copy for their **National Agency**, bearing in mind the priorities and rules laid down in the Community call for proposals.
- The **Commission**, with the assistance of a group of independent experts, assesses pre-proposals and submits the list for the Committee's opinion. It then draws up a short list of successful pre-proposals and forwards the results to promoters, while suggesting possible improvements to their pre-proposals, on the basis of the comments by the independent experts. Only promoters whose pre-proposals have been successful are invited to submit a full proposal.

STAGE 2

- **Promoters** whose pre-proposals have been successful submit a full proposal to the **Commission** and a copy to their **National Agency**.
- The **Commission**, with the help of a group of independent experts, evaluates full proposals.
- For full proposals likely to be approved, the **Commission**, on the basis of the evaluations carried out by the experts, draws up the eligible ex-ante budget appropriate for each proposal, as well as the amount of the corresponding Community contribution.
- The **Commission** draws up a short list of proposals.
- The **Commission** receives the Committee's opinion on its proposed selection list.
- The **Commission** then draws up the definitive list of successful proposals and informs the Committee.
- The **Commission** informs promoters of the final decision and then draws up contracts with promoters whose proposals have been accepted.

32 See Annex 2 "Terminology".

VII.2 The various elements of pre-proposals and full proposals (procedures B and C)³³

As mentioned earlier, proposals under procedure A are submitted in one step only (for more details, please refer to the specific Guide on mobility). As regards selection procedures B and C, they comprise two stages: presentation and selection of pre-proposals and presentation and selection of full proposals.

The application form is the same both for pre-proposals and full proposals but, in the former, only some items are filled-in as indicated in the application forms – sections A (“promoter organisation”), B (“presentation of the proposal”), C (“objective of the project”), D (“partners”).

The pre-proposal

The pre-proposal should concentrate on the following elements:

- accurate needs analysis
- objectives of the proposal;
- target group(s);
- expected outcomes;
- expertise and role of the partners;
- global cost estimate of the project.

In terms of content, the pre-proposal and full proposal must represent the outcome of close consideration of a recognised need. It should reflect the transnational nature of the Leonardo da Vinci programme for the development of innovative training approaches and materials.

At the pre-proposal stage, one important issue is to identify organisations and institutions from different participating countries and people from different occupational backgrounds (e.g. different economic and/or educational sectors) who can bring in a range of expertise to address a common idea.

The full proposal

The full proposal is based on the pre-proposal but it is more detailed. In addition to the information already provided in the pre-proposal, it must include:

- a work plan, which should describe the work-packages of the project (including the objectives, duration and expected outcomes of each work package), the methods of work, the precise role of the partners in each work package, the quality management plan (evaluation and quality assurance) and a detailed valorisation plan (dissemination and exploitation of results);
- a detailed financial plan for each expenditure category, indicating clearly the origin and nature of any funding which is not covered by the Leonardo da Vinci programme³⁴.

33 See Annex 2 "Terminology".

34 See Annex 3 and the “Administrative and Financial Handbook relating to pilot projects (including Thematic Actions), Language Competencies, Transnational Networks and Reference Materials”. The Handbook can be downloaded at the following address: http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html

VIII. WHAT HAPPENS AFTER SELECTION?

VIII.1 Informing promoters

Once the selection procedure has been completed, the National Agencies (for proposals under procedures A and B) or the Commission (for proposals under procedure C) inform the promoters of the results in writing.

VIII.2 Checks prior to contractualisation

As regards proposals likely to be selected under procedures B and C, the National Agencies (procedure B) or the Commission (procedure C) will send promoters a “Contracting information request form”, which they are asked to fill in and return to the appropriate organisation according to the applicable procedure.

At the time of the sending of the above-mentioned “Form”, the Commission or the Agencies may be required to ask the promoter to make some adjustments to the proposal, concerning the budget and the work programme, on the basis of the conclusions of the evaluation. If this is the case, the promoter will indicate any such modifications in the “Form”. **These adjustments may in no way have any consequences on the objectives and the results of the project, which must remain the same as those outlined in the approved proposal.**

After receipt of the “Contracting information request form”, duly completed and accompanied by the requested documents, the National Agencies (procedure B) or the Commission (procedure C) will carry out a check on these documents.

VIII.3 Contractualisation process

If checks are positive, a standard contract will be sent to promoters in duplicate by the National Agency (procedures A and B) or the Commission (procedure C). After the signing of the contract by both parties, the promoter becomes the project **contractor**, and is solely responsible for its performance in relation to the National Agency or the Commission. Then, the first instalment of the Community grant will be paid to the contractor, in accordance with the contract provisions.

As regards projects under procedure A, the contractor must ensure that contracts be signed prior to each placement/exchange by all the parties involved (contractor, sending organisation, host organisation, beneficiary). These contracts will be sent to the National agency, in accordance with the deadlines established by the standard contract.

As regards projects under procedures B and C, within three months of the coming into effect of the contract, contractors must sign bilateral contracts with all their partners and send them to the National Agency or the Commission, according to the applicable procedure. It will also be essential at this stage for the different players in the partnership to conclude a written agreement on the aspects concerning intellectual property and copyright related to the results, especially with regard to the transfer, dissemination and possible commercialisation of the results³⁵.

Promoters have to take account of the deadlines of the contractualisation process in drawing up their plan of work and their budget planning document.

35 The Commission and the national authorities will not retain any right related to the intellectual property of developed projects. They will, however, reserve the right to use the results during actions organised for demonstration purposes. It is also pointed out that, if the project results should be commercialised, the promoter should refer to the memorandum available on the Leonardo da Vinci Website (see address in annex 6); the promoter shall be bound to notify the National Agency or the Commission (depending on the procedure according to which the project was selected) of any commercialisation activity.

VIII.4 Project implementation monitoring

Throughout the project implementation phase, the contractor and/or co-ordinator³⁶ and the various partners, must comply with any undertakings they have entered into, either mutually or with the National Agencies and the Commission, in accordance with the contractual provisions. The contractor is solely responsible for correct project performance and compliance with contractual undertakings in relation to the National Agency or the Commission.

In order to ensure follow-up of projects and monitor progress and implementation, the Commission and the National agencies have developed a number of monitoring tools:

1. The interim report³⁷, which the contractor or the co-ordinator (if applicable) must submit to the National agency or the Commission, in accordance with the applicable procedure, within the deadlines established by the contract. For projects under procedures B and C, the interim report shall be accompanied by the interim results of the project. The report will allow the National Agency or the Commission to assess work accomplished and to decide whether to pay the second instalment of the Community grant.
2. Visits of the projects, at least once during the lifecycle of the project, for instance at a partnership meeting. Indeed, experience shows that a real time support can prove useful e.g. to resolve difficult situations, solve problems, and cope with methodological or financial management questions, which could hinder the normal progression of the project.
3. For projects under procedure C³⁸, a contact meeting with all contractors after contractualisation in order to clarify administrative and financial management issues and to recall the Commission's requirements regarding monitoring and quality of project results; the meeting will be organised by the Commission in Brussels. Similar meetings may be organised by National Agencies for projects under procedure B.
4. For projects under procedures B and C, a monitoring activity to encourage networking between projects dealing with similar themes. For this purpose, contractors will be requested to present their interim and final results at seminars and meetings organised by the Commission or the National Agencies. These meetings will also allow contractors to make acquaintance with each other, exchange their experiences and good practices and develop synergies within the Programme.
5. Project promoters should expect, if selected, to participate in thematic monitoring activities, which will consist in participating once a year in a working meeting with promoters of projects covering the same domain with a view to exchange experience on both content of their projects and their valorisation activities.
6. Furthermore, the contractor may be requested to reply to surveys, interviews or meetings as part of the project backup process or for the purpose of evaluating the implementation of the programme.

As regards monitoring activities under 3, 4, 5 and 6, it is recommended that promoters under procedures B and C include costs for at least three meetings (national and transnational) in the budget of the full proposal, for participation of the contractor and possibly of another member of the partnership³⁹.

VIII.5 Final reports

When the project ends, the contractor or the co-ordinator (where applicable) must submit a final report to the National Agency or the Commission, in accordance with the applicable procedure, within the deadlines established by the contract. For projects under procedures B and C, the final report shall be accompanied by the final results of the project. The report will allow the National agency or the Commission to assess work accomplished and to decide whether to pay the balance of the Community grant.

36 See Annex 2 "Terminology"

37 For projects lasting longer than 18 months

38 See item VIII.8 hereafter

39 Under heading "Operational costs –travel". In accordance with the rules established in the "Administrative and Financial Handbook relating to pilot projects...", only travels taking place during the life of the project can receive a Community grant.

For procedures B and C in particular, the amount to be paid will be determined according to the quality of the results obtained and the analysis of the eligibility of direct expenditure⁴⁰. The evaluation of the final report comprises two elements:

- an analysis of conformity to the proposed work programme, including the quality management plan and the dissemination strategy. Evaluation criteria include more particularly the consistency of activities and process, their transnationality, their transferability and their relevance.
- an analysis of the quality of project results. Evaluation criteria include the pedagogic appropriateness of products to target concerned, their innovative character, the extent to which the medium is appropriate to target group(s) and potential users, the actual dissemination of the results.

The following tables describe the various stages in the implementation phase.

40 For further details, see the “Administrative and Financial Handbook relating to pilot projects...”.

VIII.6 Lifecycle of a project selected under procedure A

WHO	WHAT	WHEN
THE NATIONAL AGENCIES	<p>Contractualisation</p> <ul style="list-style-type: none"> ➤ conclude contracts with promoters and distribute among them the Community funds ➤ make the first Community payment instalment in accordance with the contract rules. 	<p>About 4-5 months after receipt of proposals</p> <p>After receipt of duly signed contracts</p>
THE CONTRACTOR OR COORDINATOR, IN COOPERATION WITH THE PARTNERS	<p>Work programme management and implementation</p> <ul style="list-style-type: none"> ➤ is responsible for project management, implementation and evaluation, and for the dissemination and transfer of the results ➤ makes sure that quadrilateral contracts are sent to the National Agency as soon as possible ➤ is responsible for establishing sound project financial management, procedures and records ➤ draws up the interim (where appropriate) and final reports by using the report forms provided by the National Agency ➤ keeps all financial documentation for final controls of supporting documents or <i>in situ</i> controls conducted by the National Agency or possible auditing by Commission services and/or Court of Auditors or by any other persons commissioned to do so by the latter bodies. 	<p>During the life of the project.</p> <p>Within the deadlines specified in the contract.</p> <p>During the life of the project.</p> <p>Within the deadlines specified in the contract.</p> <p>Up to five years after the last payment, even when an audit has taken place.</p>
THE NATIONAL AGENCIES	<p>Project monitoring</p> <ul style="list-style-type: none"> ➤ are responsible for monitoring ongoing projects in accordance with the conditions laid down with the national authorities and Commission ➤ are responsible for evaluating interim and final reports and financial controls of documents or <i>in situ</i> controls ➤ advise on continuation of the work ➤ make payments under the terms of the contract ➤ submit an annual report to the Commission setting out the results of mobility projects. 	<p>During the life of the projects</p> <p>During the life of the projects</p>

<p>THE NATIONAL AGENCIES</p>	<p>Dissemination</p> <ul style="list-style-type: none"> ➤ the National Agencies, in conjunction with the Commission, draw up procedures for the dissemination of the innovative best practices of mobility projects. This may take the form of conferences, seminars or subject-related databases. Promoters are invited to take part, as they remain responsible for the dissemination of the results of their projects. <p>Impact and enhancement</p> <ul style="list-style-type: none"> ➤ the National Agencies are responsible for building on and embedding the results of projects, according to procedures established with the Commission and the national authorities. 	<p>During and after the duration of the projects</p> <p>Mainly on basis of finalised projects.</p>
-------------------------------------	---	--

VIII. 7 Life cycle of a project selected under procedure B

WHO	WHAT	WHEN
<p>THE NATIONAL AGENCIES</p>	<p>Contractualisation</p> <ul style="list-style-type: none"> ➤ send to the promoter the information request form with a view to contractualisation which may indicate, where appropriate, the revised budget and Community contribution ➤ send to the promoter a standard contract ➤ make the first Community payment instalment in accordance with the contract rules. 	<p>After the decision on selected projects</p> <p>After receipt and acceptance of the “Contracting information request form” and after checking the legal status and the technical and financial capacity of the promoter</p> <p>Normally within 60 days of receipt of the duly signed contract.</p>
<p>THE CONTRACTOR OR COORDINATOR, IN COOPERATION WITH THE PARTNERS</p>	<p>Work programme management and implementation</p> <ul style="list-style-type: none"> ➤ is responsible for project management, implementation and evaluation, and for the dissemination and transfer of the results ➤ makes sure that the bilateral contracts that he/she signed with his/her partners are sent to the National Agency ➤ is responsible for establishing sound project financial management, procedures and records ➤ draws up interim and final reports by using the report forms provided by the National Agency of his/her country and submits them to the National Agency ➤ keeps all supporting financial documentation for final controls of supporting documents or <i>in situ</i> controls conducted by the National Agency or possible auditing by the Commission services and/or Court of Auditors or by any other persons commissioned to do so by the latter bodies. 	<p>During the life of the project.</p> <p>Within the deadlines specified in the contract.</p> <p>During the life of the project.</p> <p>Within the deadlines specified in the contract.</p> <p>Up to five years after the final payment, even when an audit has taken place.</p>
<p>THE NATIONAL AGENCIES</p>	<p>Project monitoring</p> <ul style="list-style-type: none"> ➤ define the project monitoring arrangements with the Commission ➤ must take care of individual and thematic project monitoring and advise on continuation of the work ➤ are responsible for evaluating interim and final reports and financial controls of documents or <i>in situ</i> controls ➤ make payments under the terms of the contract. 	<p>During the lifetime of the projects.</p> <p>Within the deadlines specified in the contract.</p>

<p>THE NATIONAL AGENCIES AND THE COMMISSION</p>	<p>Valorisation</p> <ul style="list-style-type: none"> ➤ the National Agencies, in conjunction with the Commission, draw up procedures for the dissemination and exploitation of the interim and final results. This may take the form of (thematic) conferences and seminars, product exhibitions or subject-related databases. Promoters are invited to take part, as they remain responsible for the valorisation of the results of their projects. <p>Impact and enhancement</p> <ul style="list-style-type: none"> ➤ the National Agencies are responsible for building on and embedding the results of projects, according to the procedures established with the Commission and the national authorities. 	<p>During the life of the project and after.</p> <p>In particular when final results are available</p>
--	--	--

VIII.8 Life cycle of a project selected under procedure C

WHO	WHAT	WHEN
THE COMMISSION	<p>Contractualisation</p> <ul style="list-style-type: none"> ➤ sends to the promoter the information request form with a view to contractualisation which may indicate, where appropriate, the revised budget and Community contribution ➤ sends to the promoter a standard contract ➤ makes the first instalment payment of the Community's contribution in accordance with the contract rules. 	<p>After the decision on selected projects</p> <p>After receipt and acceptance of the "Contracting information request form" and after checking the legal status and the technical and financial capacity of the promoter</p> <p>Normally within 6 weeks of receipt of the duly signed contract.</p>
THE CONTRACTOR OR COORDINATOR, IN COOPERATION WITH THE PARTNERS	<p>Work programme management and implementation</p> <ul style="list-style-type: none"> ➤ is responsible for project management, implementation and evaluation, and for the dissemination and transfer of the results ➤ makes sure that the bilateral contracts that he/she signed with his/her partners are sent to the Commission ➤ is responsible for establishing sound project financial management, procedure and records ➤ draws up interim and final reports by using the report forms provided by the Commission and sends them to the Commission ➤ keeps all financial documentation for final controls of supporting documents or <i>in situ</i> controls or possible auditing by the Commission services and/or Court of Auditors or by any other persons commissioned to do so by the latter bodies. 	<p>During the life of the project.</p> <p>Within the deadlines specified in the contract.</p> <p>During the life of the project.</p> <p>Within the deadlines specified in the contract.</p> <p>Up to five years after the final payment, even when an audit has taken place.</p>
THE COMMISSION	<p>Project monitoring</p> <ul style="list-style-type: none"> ➤ defines project monitoring arrangements in conjunction with the National Agencies ➤ takes care of individual and thematic project monitoring ➤ is responsible for evaluating the interim and final reports; advises on continuation of the work ➤ makes interim and final payments in accordance with the terms of the contract. 	<p>During the lifetime of the projects.</p> <p>Within the deadlines specified in the contract.</p>

<p>THE COMMISSION</p>	<p>Valorisation</p> <ul style="list-style-type: none"> ➤ in conjunction with the National Agencies, draws up the procedures for the dissemination and exploitation of the interim and final results. This may take the form of (thematic) conferences and seminars, product exhibitions or subject-related databases. Promoters are invited to take part. 	<p>During the life of the project and after.</p>
	<p>Impact</p> <ul style="list-style-type: none"> ➤ is responsible for building on and embedding the results of projects, with input from the National Agencies and, where appropriate, from other organisations such as Cedefop and the European Training Foundation. 	<p>In particular when final results are available</p>

Annex 1 – Scope of the programme - definitions

Initial vocational training

Means any form of initial vocational training, including technical and vocational teaching, apprenticeship and vocationally oriented education, which contributes to the achievement of a vocational qualification recognised by the competent authorities in the Member State in which it is obtained.

Work-linked training

Means vocational training at any level including higher education. This vocational training, recognised or certified by the competent authorities of the Member State of provenance according to its own legislation, procedures or practices, involves structured periods of training in an undertaking and, where appropriate, in a vocational training establishment or centre.

Continuing vocational training

Means any vocational training undertaken by a worker in the Community during his or her working life.

Lifelong learning

Means the educational and vocational training opportunities offered to individuals throughout their lives to enable them continually to acquire, update and adapt their knowledge, skills and competencies.

Lifewide learning

All learning activity whether formal, non-formal or informal. Lifewide learning is a dimension of lifelong learning.

Formal learning

Learning typically provided by an education or training institution, structured (in terms of learning objectives, learning time or learning support) and leading to certification. Formal learning is intentional from the learner's perspective.

Non-formal learning

Learning that is not provided by an education or training institution. It is, however, structured (in terms of learning objectives learning time or learning support). Non-formal learning is intentional from the learner's perspective.

Informal learning

Learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional but in most cases it is non-intentional (or 'incidental' / 'random').

E-learning

Learning that is aided by Information & Communications Technologies (ICT).

Knowledge-based society

A society whose processes and practices are based on the production, distribution and use of knowledge.

Open and distance vocational training

Means any form of flexible vocational training involving: the use of ICT (Information and Communication Technologies) techniques and services in traditional or modern form and support in the form of individualised advice and mentoring.

European pathways for work-linked vocational training and apprenticeship

Means any period that is completed by a person in a Member State, other than the one where his or her work-linked vocational training is based, which forms part of the work-linked vocational training. Evidence of these training periods may be given in a specific document called: "EUROPASS training".

Vocational guidance

Means a range of activities such as counselling, information, assessment and advice, to assist people to make choices relating to initial and continuing vocational education and vocational training programmes, and to employment opportunities.

Curricula

The group of subjects studied and taught.

Assessment

A general term embracing all methods used to appraise/judge the performance of an individual or group.

Certification

The process of issuing certificates or diplomas, which formally recognise the achievements of an individual, following an assessment procedure.

Valuing learning

The process of recognising participation in and outcomes of (formal, non-formal or informal) learning, so as to raise awareness of its intrinsic worth and to reward learning.

Self Assessment within Vocational Education & Training (VET) Institutions

Any process or methodology carried out by a Vocational Education & Training (VET) institution, to evaluate its own performance.

Annex 2 – Terminology

Promoter

Any institution or body, private, public or semi-public which, on behalf of the other partners associated in the process of applying for financial support from the programme, declares its intention, in accordance with the set procedures, to submit a proposal for transnational co-operation within the scope of the programme. The promoter becomes the contractor when the proposal is accepted and when a contract is drawn up with the Commission or the National Agency, according to the applicable procedure.

Partner

Any institution or body, private, public or semi-public, which is associated with the presentation of a proposal, and if the proposal is accepted and is awarded a contract (contractualisation), with the implementation of the project. When the proposal is submitted, it signs a letter by which it undertakes, according to the agreed arrangements, to contribute to the implementation of the project; if the project is accepted and awarded a contract, it will be asked to sign a contract with the project contractor.

Contractor

Any institution or body, private, public or semi-public which, if the proposal is accepted and is awarded a contract (contractualisation), is responsible for the day-to-day co-ordination and management of the project and for distributing the Community funds allocated for this project. Day-to-day co-ordination and management can be delegated to a co-ordinator, in which case the delegation arrangements must be clearly set out.

Co-ordinator

This is the institution or body selected from the members of the transnational partnership responsible for the proposal to carry out the necessary co-ordination and day-to-day management tasks at the implementation stage. This institution or body may differ from the contractor.

Contact person

This means any individual designated within the promoter/contractor organisation and/or partner organisations to provide information about the content of the proposal and, subsequently, about the project.

Proposal

A generic term covering pre-proposals and full proposals.

Pre-proposal

Whatever the type of measure concerned (but with the exception of the Mobility measure), this is the promoter's first step for submitting a proposal for financial support from the programme. The contents of this pre-proposal must constitute a transnational initiative in compliance with the programme's objectives and formal eligibility conditions. The pre-proposal will concentrate on the following elements: objectives, target group(s), expected outcomes, expertise and role of the partners and the global cost estimation of the project.

Full proposal

Whatever the type of measure concerned, this is the final form of the promoter's application for financial support under the programme submitted as a full dossier either to the National Agencies (procedures A & B) or to the Commission (procedure C). In addition to the information already provided in the pre-proposal it will include a work plan (divided in work-packages and including the description of the quality management plan and the dissemination plan for the results) and a detailed financial plan for each expenditure category (indicating clearly the origin and nature of any funding which is not covered by the Leonardo da Vinci programme). **Project** A full proposal, selected and awarded a contract, giving rise to Community financial support.

Letter of intent

The letter sent by each partner expressing its agreement to participate in the project. This letter should be written on headed paper, dated, and signed by the authorised person in the partner organisation and make an explicit reference to the Leonardo da Vinci programme. In addition it should indicate the title of the project, a summary of the role of the partner and its financial contribution.

Target group

This term refers to adults or young people, undergoing training, actively employed, in search of a first job or new employment covered by the various measures of the programme (with the exception of the Mobility measure) and who are concerned by the actual application of the project results.

Beneficiary

Under the Mobility measure, this term covers young people and adults who will take part in a placement or exchange project in a host country other than that where they reside, originate, are employed or undergoing training. It should be noted that, under this definition, people accompanying participants in placements and exchanges projects are not regarded as beneficiaries of the project.

Worker

Any person available on the labour market, as defined in accordance with national legislation and practices, including self-employed workers.

Undertaking

Any undertaking from the private or public sector, regardless of its size, its legal status or the economic sector in which it operates, and any economic activity, including the social economy.

Target sectors

The economic sectors addressed by the proposal (NACE code) and which will benefit from the results of the project.

Potential users

Organisations and/or persons likely to use the results of the project(s) (products, curricula, reports, studies, methodology, etc.) for the benefit of the target group(s) and sector addressed by the project.

European organisations

Means social partners at Community level, European employers' and trade union federations in specific sectors, and bodies and organisations with a European status or scope. These organisations will be identified by the initials "EUR", as will their project proposals.

Social partners

This means employers' and workers' organisations in conformity with laws and/or practices at national level and employers' and workers' organisations taking part in social dialogue at Community level.

Valorisation

Originally a French term, "valorisation" can be described as the process of disseminating and exploiting projects outcomes with a view of optimising their value, enhancing their impact and integrating them into training systems and practices at local/national as well as European level.

Annex 3 - Main financial rules applicable to the projects

As far as the financial rules applicable to projects financed under the Programme are concerned, the promoter is asked to refer to the Administrative and Financial Handbook specific to the measure concerned.

These handbooks are available at the following address:

http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html

Mobility projects

The Community contribution granted to promoting organisations for mobility projects covers mainly three types of expenditure, viz.:

1) Grants for placement/exchange beneficiaries

The Community's financial contribution to transnational placement/exchange projects may not exceed 5 000 Euro per beneficiary, for a placement or an exchange (this is the maximum amount corresponding to the maximum duration of each action). It may be increased for disabled participants.

The grant consists of three parts, i.e.:

- a) flat-rate subsistence allowance;
- b) travel costs;
- c) insurance costs.

2) Support for SMEs and pedagogic, cultural and linguistic preparation

An amount of up to 10% of the allocation for each project may be granted:

- to promoters which are SMEs, for preparation of their first proposal. The Leonardo da Vinci Committee will annually specify the amount to be granted, which will not exceed 500 Euro per SME;
- to promoters of placement projects only, for the preparation of beneficiaries. The amount allocated for pedagogic, cultural and linguistic preparation may not exceed 200 Euro for a placement of less than three months or 500 Euro for a placement of more than three months, with a ceiling of 25 000 Euro per promoter and per selection year.

3) Management and monitoring costs

A lump sum may be granted to promoters to help with their costs in managing and monitoring placement/exchange projects. The maximum amount is 100 Euro per beneficiary for an exchange or placement of less than three months, or 200 Euro per beneficiary for a placement of more than three months, with a maximum of 25 000 Euro per promoter and per selection year.

For further information please refer to the Administrative and Financial Handbook for Mobility or contact your National Agency.

Pilot projects, language competencies, transnational networks and reference material

In keeping with the programme rules, promoters interested in such measures must first of all submit a pre-proposal to the competent authority (their country's National Agency for measures under procedure B, and the Commission for those under procedure C). The pre-proposal should only give an estimate of the overall project cost.

Promoters whose pre-proposals are chosen will be invited to submit a full proposal, which must contain a detailed provisional budget. When drawing up this budget the promoter must know the types of cost borne by the Commission and the levels, as well as the financial rules applicable during the project's life cycle. These are given in the Administrative and Financial Handbook, which also sets out the expenditure eligibility rules applicable to the action in question.

Expenditure is divided into three categories, viz.:

1. Staff costs
2. Operating costs:
 - travel expenses
 - use of information and communication technologies (ICT)
 - production
 - overheads
 - other
3. Sub-contracting costs.

In their proposal, promoters **must** complete the four financial tables of the application form giving:

- a breakdown of the estimated expenditure by work-package and by type of costs;
- a breakdown of the estimated staff need and cost by partner;
- a breakdown of the estimated expenditures by type of cost and by partner;
- estimated funding sources by type of funds and by partner.

When drawing up their budget, promoters must bear some basic principles in mind, viz.:

- staff costs must be based on real daily rates;
- overheads are covered by a lump sum and may not exceed 7 % of the total project cost;
- the overall costs of computer and audio visual equipment (ICT) must not exceed 15% of the total project cost;
- sub-contracting costs must not exceed 30% of the total project cost;
- unless otherwise stated in the Administrative and Financial Handbook, costs will be looked at on a real-cost basis (in other words, they must be supported by accounting documents *ad hoc*) and on a cost-effectiveness basis.

For further information please refer to the Administrative and Financial Handbook for Pilot projects (including Thematic actions), Languages competencies, Transnational networks and Reference material (the Handbook can be downloaded at the following address

http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html), or contact your National Agency.

Annex 4 – The role of the different institutional players in programme management

The **Commission** has overall responsibility for the implementation and sound management of the programme. It ensures that the implementation is consistent in order to guarantee equal access to information, and to the programme in all the participating countries, and to ensure that common criteria are applied in the evaluation and selection procedures. It submits the priorities for each of the Community calls for proposals to the Committee. It draws up the lists of projects selected under procedures B and C, and it signs contracts with the promoters of projects selected under procedure C.

In running the programme, the Commission is assisted by a **Committee** made up of two representatives from each of the Member States. Representatives of the other participating countries and of the social partners attend committee meetings without voting rights. This Committee gives opinions on the broad implementation guidelines, the annual plan of work (including the priorities for the Community call for proposals), the themes of the “thematic actions” and the “joint actions”, the annual budget allocation and the selection lists of projects under procedures B and C.

The **National Agencies** assist the participating countries and co-operate with the Commission, on behalf of the Member States, in implementing the programme at national level. More particularly, they are responsible for:

- Information, monitoring, evaluation and dissemination activities with a view to facilitating access to the programme and improving arrangements for disseminating the programme results;
- Preparing and applying the A and B selection procedures and concluding contracts with promoters according to the common rules and arrangements set out at Community level;
- Monitoring, organising and evaluating projects under procedures A and B, and helping to disseminate and embed their results;
- Providing assistance, according to arrangements to be decided on with the Commission, for the monitoring of projects selected under procedure C, and helping to disseminate and embed their results.

Annex 5: THE VALORISATION PLAN

GUIDELINES FOR PROJECT PROMOTERS

1. INTRODUCTION

This handbook is intended for promoters of Leonardo da Vinci projects and aims to provide guidance for them in planning their valorisation activities and help them in drafting the valorisation plan forming part of their project. Further information on valorisation is also available on the Europa website: http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html or directly from the European Commission (unite-B3@cec.eu.int) or the national agencies.

2. WHAT IS VALORISATION?

Originally a French term, the concept of valorisation is now widely accepted by the European vocational training community. "Valorisation" can be described as the process of **disseminating and exploiting** projects outcomes⁴¹ with a view to optimising their value, enhancing their impact and integrating them into training systems and practices at local/national as well as European level.

3. VALORISATION: A NEW CHALLENGE FOR THE LEONARDO DA VINCI PROJECTS

The 2005–2006 call for proposals constitutes a major step as regards valorisation. For the first time in the history of the Leonardo programme, valorisation activities have become compulsory, hence, an important selection criterion for procedure B and C projects. The call for proposals requires inclusion of valorisation **from the project design stage** and close monitoring of its implementation **throughout the entire life cycle** of the project. The promoter will be required to perform specific valorisation activities in particular in order to:

- a. **ensure that the project results meet needs clearly identified at the outset so that they can be used in vocational training systems and practices (=exploitation of results)**
- b. **produce information focusing on the project's various activities (=dissemination of results).**

The valorisation activities must be spelled out in a single, coherent valorisation plan which must include a balanced description of activities for disseminating and exploiting the project results.⁴² The valorisation activities must also be clearly identified in the project budget.

⁴¹ Projects outcomes can be tangible like training products, course materials etc. as well as intangible like training methodologies, processes or experiences.

⁴² "In order to be more relevant than ever, care has to be taken that the results of the new projects to be selected in 2005 and 2006 be properly disseminated and implemented during and after project's life. It is therefore requested that for a proposal to be accepted within all the priorities and actions proposed, a "valorisation" plan (i.e. plan for the dissemination and exploitation of innovative project results) be made explicit with appropriate and adequate resources. This plan should: identify the needs of interested sectors, domains and end users; define clearly the end users of the project's results; ensure that these end users will be consulted during the life of the project; explain how during and after the end of the project, the results will be disseminated and exploited; how they will reach these objectives both during and after the development of the project, and which outside players and bodies will be involved. On completion of their projects promoters should make the results of their projects available to the public by setting up a web site as a show case for their work" (text of the call for proposals 2005–2006, published in OJ C 103 on 29/04/2004).

4. DISSEMINATION: A KEY TO VALORISATION

All projects are required to arrange for dissemination from the onset of activities. Information on how a project is developing and dissemination of the results to target groups are the essential tools for project valorisation. Dissemination involves ongoing production of clear, targeted information on a project's achievements via appropriate means. In addition, Leonardo promoters have been required since 2002 to make their project results accessible to the public on a **website**, a showcase for their work.

Information on the project and the dissemination of its results provide a vital basis for implementation and exploitation of project results and their incorporation into vocational training systems and practices. From that perspective, dissemination is a strategic tool of valorisation but it needs to be supplemented by specific measures for exploiting, using and assuring the sustainability of the project results. This is achieved through constant interaction between the project partners and a sample of potential users of the project results right from the start of the project when the proposal is drawn up and throughout its entire lifecycle.

NB: the innovation compared to the past is the requirement not merely for a dissemination plan, but for a more comprehensive plan giving an overview of all the activities involved in dissemination/information and exploitation/utilisation of the results! The former dissemination plan is thus replaced by the new valorisation plan (dissemination + exploitation).

5. A GOOD VALORISATION PLAN: A QUALITY CRITERION!

All Leonardo projects must make provision for a clear, detailed valorisation plan (i.e. a plan for the dissemination and exploitation of the project's expected results) with **an explicit, accurate allocation in the budget** for carrying out the proposed activities (roughly between 10 and 20% of the total budget).

The goal of a valorisation plan is to explain how **during and after the end** of the project the results will be **disseminated and exploited** so as to make them "sustainable" (= once the project has come to an end, the results must continue to be deployed in different vocational training contexts). A valorisation plan must therefore necessarily set out in a balanced and accurate way the activities relating to dissemination and the activities relating to and facilitating exploitation of the results by the end and/or potential users and for the benefit of target groups clearly identified from the project design stage.

The valorisation plan is intended to be a flexible tool which can be adapted in the course of a project to ensure that it satisfies as fully as possible the latest needs of the partnership or the users.

NB: valorisation is a shared responsibility which falls to all the project partners; they must take an active part in bringing into effect the measures set out in the valorisation plan.

At the end of this handbook you will find a check list (not exhaustive) with a few practical questions you should ask yourself when preparing the valorisation plan and working out the steps to be taken to disseminate and exploit your project.

6. COMMERCIALISATION

Commercialisation of Leonardo products is an option and it is an instrument of making project's results disseminated, exploited and self-sustainable. Projects' promoters must just be aware of some basic rules.

- **Copy right issue:**

Project results are the industrial and intellectual property of the **contractor**, although the Commission retains the right to make free use of products for demonstration and dissemination purposes. An intellectual property agreement between promoter and partners is however recommended (and compulsory in case of commercialisation). **Since 2003** Commission has the right to hand over a copy of projects' results to third parties

interested in testing or further development (excluded any commercial use of these results) provided the contractor has no opposition to that.

- **Marketing of products:**

In case he intends to market his product(s), the promoter needs to inform the Commission. A standard information letter is available on the Leonardo da Vinci web site (http://http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html). In case of commercialisation, a marketing plan and an intellectual property agreement between partners have to be sent to the Commission.

Any income generated through commercialisation during project's life must be declared in the final report!

7. THEMATIC MONITORING: A TOOL FOR VALORISING PROJECTS UNDER WAY

In conjunction with the national agencies, the European Commission organises monitoring of projects selected and under way with the aim of stimulating interaction and exchanges between project promoters and partners working on the same theme (or in the same sector) and putting them in contact with potential users. In the event of selection, project tenderers must plan to take part in thematic monitoring (for example, to include the cost of taking part in a seminar each year with the project promoters working in the same area with a view to exchanging experiences on the substance of their project and on their valorisation activities).⁴³ In addition, they must plan to participate once during the course of their project in a valorisation conference assembling project promoters and potential users. The expenditure incurred is eligible. These activities can be included in the valorisation plan.

NB: The project valorisation activities cannot be restricted to participation in the events arranged by the European Commission and the national agencies in the context of thematic monitoring! **The project partners are the prime movers and the only persons responsible for dissemination and exploitation!**

IN SHORT

Before drafting a valorisation plan, the promoters must have already come up with clear answers to three key questions:

- **what will be the final outcome of the project? (anticipation of result)**
- **what training needs does it meet? (ex-ante analysis of needs)**
- **who will be the user and/or end (and potential) beneficiary of the project's results? (sustainability of results).**

In addition, a valorisation plan must give details of:

- **the dissemination and exploitation activities (what?)**
- **the most adequate means (how?)**
- **the most appropriate and efficient timetable (when?)**
- **the resources available (human and financial).**

⁴³ The five current themes are: social and vocational integration; skills development in businesses, particularly SMEs; quality; transparency; e-learning. For more information on thematic monitoring:

http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html

CHECK LIST

VALORISATION PLAN = DISSEMINATION + EXPLOITATION

(section E1 of the application forms)

DISSEMINATION

- Do the activities proposed in the valorisation plan form a continuous process throughout the project?

(The valorisation activities commence at the start of the project thanks to strategic planning; they continue throughout its implementation and do not come to an end when the project does.)

- Do all the project partners share responsibility for valorisation?

- Are the activities for disseminating the results detailed, clear and quantified?

(Example: number of persons benefiting from the dissemination activities, budget percentage earmarked for dissemination, any dissemination activities directed at other information multipliers, means for dissemination in the long term such as scientific articles, conference proceedings, Internet sites, commercialisation, and in the short term, the media, seminars, conferences, exhibitions, and so on.)

- Are the dissemination activities and means adapted to and suitable for the project goals and beneficiaries?

Does the project provide for setting up an Internet site accessible to the public presenting the project's achievements? Is it planned to update the site after the project has been completed? How will access to the results be assured after completion of the project?

- Is there continuous interaction between project partners and end/potential users of the results?

(The project's direct beneficiaries are also the parties towards whom the dissemination activities are targeted, but provision is also made for information and awareness-raising among potential users, political decision-makers and/or key players in the project's field of activity, including the social partners.)

Is the dissemination to be organised at different levels? (i.e. local, national, European and sectoral level via efficient relays for promotion purposes, such as transnational networks)

EXPLOITATION

Are the exploitation activities detailed, clear and quantified?

Are the end users involved in the different stages of the project and are they consulted regularly in the course of the project?

(Their advice and requirements are essential with a view to producing an immediately useable output. The users may be involved at different stages, for example, already when reviewing requirements, when testing the prototype, and in the assessment of interim and final results. This involvement is important to adaptation of the results and possibly to reshaping certain project activities.)

Are the needs of potential users taken into account in the course of the project? Are they kept informed and involved in the activities?

Has provision been made for passing on the project results to decision-makers and vocational training professionals?

(The ultimate goal is to have the product incorporated into systems and practices, for example by having it recognised/certified; involvement at policy-making level is therefore essential to the results' sustainability.)

Does the project include a product test stage before finalisation with the end beneficiaries/users?

(The results of the test should be taken into account in adapting and finalising the product.)

Is it planned to update the results after completion of the project?

On the whole, are the valorisation (dissemination + exploitation) activities clearly identified and quantified in the project budget? Are the valorisation activities in line with the proposed budget?

(About between 10 and 20% of the budget should be earmarked for valorisation to ensure an effective result.)

Has provision been made for an agreement between the partners on intellectual property rights?

(Such an agreement is not compulsory, but could prove useful. At all events, it must not prevent any future use of the product by third parties, while abiding by the right to commercialise the product.)

Could the expected products be easily transferred to and exploited in other sectors/target groups/social and cultural environments?

(Product easy to use from the technical point of view, product including maintenance and follow-up after completion of the project, product bringing new approaches to training; product aimed at target group not currently covered; product designed in such a way that its content and/or its technology can be easily adapted; product solving European-scale problems; product available in several languages.)

Has provision been made for participation in thematic monitoring activities?

NB: to ensure that valorisation is incorporated efficiently into a project from the design stage, it must be taken into account in all stages, particularly when needs are analysed and the partnership members selected.

NEEDS ANALYSIS (section C1 of the application forms)

Does the project include a satisfactory ex-ante analysis of the training needs it is intended to meet?

(Consultation of future beneficiaries and future users of the project results is fundamental in this stage.)

Does the project incorporate an accurate analysis of the state of play in the project theme?

(This is important so as to show its added value and avoid any redundancy; SWOT⁴⁴ analysis may be useful in this stage.)

PARTNERSHIP (section D of the application forms)

Does the project provide for a stable partnership? Is the partnership based on existing cooperation?

(that is, is it part of medium and long-term cooperation between the partners)

Does the partnership include several players and provide in particular for links (directly or via reliable relays) with the most representative decision-makers and professionals in the field of vocational training, including the social partners?

Does the partnership include at least one body representing organisations expected to incorporate the project results in vocational training systems and practices at national, regional and/or sectoral level (i.e. result users)?

Can the project partners demonstrate their ability and readiness to ensure that the results will be followed up after completion of the project? (i.e. updating, use, continuous dissemination, transfer, etc.)

Do the partners have professional experience in dissemination/publishing/communications?

(despite the fact that the partners share responsibility for dissemination).

⁴⁴ SWOT = strengths, weaknesses, opportunities, threats (planning activities in the light of identification of strengths, weaknesses, opportunities and risks connected with the project, the partners and the external conditions).

Annex 6 – Information sources

For general information on the programme and for answers to frequently asked questions (FAQ), go to the Internet site at:

[Http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html](http://europa.eu.int/comm/education/programmes/leonardo/new/leonardo2_en.html)

A partner search database is also available at: <http://leonardo.cec.eu.int/psd/>

For all specific questions on the programme you can also contact:

- Your **National Leonardo da Vinci agency** (address in annex 7).
- The Technical Assistance Office Socrates, Leonardo & Youth
Rue de Trèves, 59-61
B – 1040 Bruxelles/Brussels
Fax: (+32 2) 233.01.50
e-mail: leonardo@socleoyouth.be
- The European Commission,
Education and Culture Directorate-General, Directorate Vocational Training
Fax (32 2) 295 57.04
E-mail: leonardo-helpdesk@cec.eu.int

To carry out a bibliographical search, or for an overview on a particular subject or problem, consult the CORDIS database (this is an information repository for research and technology calls for tender at <http://www.cordis.lu/>) and the CEDEFOP electronic village at <http://www.trainingvillage.gr/>

Other useful addresses:

CEDEFOP – European Centre for the Development of Vocational Training

Evropis 123

GR-57001 THESSALONIKI (Pylea)

Postal address: PO Box 22427

GR-55102 THESSALONIKI

Tel. (30-31) 490 111

Fax (30-31) 490 102

E-mail: info@cedefop.gr

Homepage: <http://www.cedefop.gr>

Website: <http://www.trainingvillage.gr>

The European Training Foundation

European Training Foundation

Villa Gualino

Viale Settimio Severo 65

I-10133 Torino

Italy

E-mail: info@etf.eu.int

Website: <http://www.etf.eu.int>

Annex 7- List of National Agencies

The updated version is available at the Internet address:

http://europa.eu/int/comm/education/programmes/leonardo/new/leonardo2_en.htm