TURING SCHEME

The UK's global programme to study and work abroad

UK Government

Turing Scheme 2021 Project Handbook

Version 1.1

BRITISH COUNCIL

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The Turing Scheme is the UK programme for global educational opportunities.
The delivery partner is a consortium of the British Council and Ecorys UK.

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1. Grant Agreement and Annexes

The Grant Agreement is split into several sections and annexes.

ANNEX 1 – PAYMENT REQUEST PROCESS

This section provides details of the Payment Request process. This includes the requirements for receiving payments, when Payment Requests need to be made, amounts received and payment deadlines against Anticipated Points of Expenditure.

Please read this section carefully before moving onto the step-by-step Payment Request process.

ANNEX 2 – FUNDED ACTIVITIES

This section is prepopulated with details of each of your funded activities. This includes a breakdown of participant numbers and durations as well as a full budget breakdown. Your Project Plan is also reflected in this section, which sets out your schedule for Payment Requests, payment dates and activity start dates. You can read more about your Project Plan in the 'Payments' section.

ANNEX 3 – NOT USED

ANNEX 4 – GRANT RECIPIENT'S BANK DETAILS

This template is for Grant Recipients to complete with their bank details. The signatory must be the chief finance officer of your organisation or someone with proper delegated authority. Any change of bank details must be notified immediately on the same form and signed by an approved signatory. You must notify us of any change of signatory as soon as possible. Further guidance can be found under 'Bank Details Help Guide' directly on the template.

ANNEX 5 – NOT USED

ANNEX 6 – AGREED OUTPUTS AND LONGER TERM OUTCOMES

This annex provides a questionnaire for you to outline your project's outputs and longer term outcomes. When responding to this questionnaire you should refer to the 'Positive Impact' section of your application form. If the actual outputs and outcomes of your project vary from the intended outputs / outcomes, you should provide details of this, as well as details of any additional impact as a result of activities undertaken.

ANNEX 7 – CONTACT DETAILS

This section provides us with a summary of your main contact points, for example your lead contact person and your Legal Representative. If you need to change these details, please submit the new details using this template – for more information please see 'Making Changes to your Project'.

ANNEX 8 – PROTECTION OF CHILDREN AND VULNERABLE ADULTS

This section provides details of your responsibilities with regards to the protection of children and vulnerable adults. If there are any participants who are under the age of 18, or the work undertaken has an impact on children, then you must complete and sign the safeguarding checklist and return it to us by e-mail before the activity in question takes place. For more information, please see the 'Health and Safety' section.

ANNEX 9 – ANNUAL CERTIFICATION OF EXPENDITURE

You must complete this section if you receive grants in excess of £40,000 (excluding local authorities and Maintained Schools) to provide independent assurance that funds have been used for the delivery of funded activities. This should be submitted alongside the Final Report. For more information, please see the 'Reporting' section.

ANNEX 10 – STATEMENT OF GRANT USAGE

This section must be completed by local authorities and Maintained Schools in receipt of grants in excess of £40,000, to provide independent assurance that funds have been used for the delivery of funded activities. This should be submitted alongside the Final Report. For more information, please see the 'Reporting' section.

ANNEX 11 – CHANGE CONTROL PROCESS

This section outlines the rules for making changes to your project. It provides a breakdown of the different budget categories and gives details of the changes you can make to your project without needing approval from us.

For guidance on how to make these changes, please see the 'Making Changes to your Project' section.

ANNEX 12 – FINANCIAL MANAGEMENT AND GOVERNANCE DECLARATION

This checklist is for you to provide confirmation that the appropriate financial governance, risk management and internal controls are in place to oversee the agreed project activities. These arrangements must be made before project activities take place. The checklist must be completed and signed by your chief finance officer (or someone with proper delegated authority).

Signatures

Electronic exchange and digital signatures are permitted. An electronic signature may be a scanned signature and locked pdf signature or other form of secure signature. **It cannot be a typed signature**. For more information, please refer to your organisation's internal policy on digital signatures. It is your responsibility to ensure that the digital signatures comply with your own internal institutional digital signing policies or procedures.

Record keeping

You must keep all invoices, receipts, accounting records and any other documentation (including correspondence) relating to your project for a period of **seven years** from the date on which the funding period ends.

2. Payments

Bank details

All payments to organisations are made in British pounds sterling (GBP). Please ensure you complete Annex 4 of your Grant Agreement with details of the bank account you wish the grant to be paid into. This must be an ordinary business bank account. As mentioned, Annex 4 must be signed by the chief financial officer of your organisation, or someone with proper delegated authority. If your organisation's bank account changes during the implementation of your project, then you must complete and resend Annex 4 to us.

Project Plan

Your Project Plan is an automatically generated schedule for your project, based on the information you have provided in your application for each activity.

It provides:

- key dates for your project
- start and end dates for activities
- activity funding dates for requesting payment

- Organisational Support payment dates

Payment Requests

In order to trigger the payment of funds for each activity, you will need to make Payment Requests via the Live Reporting Tool (LRT). The mobility start dates and Anticipated Points of Expenditure you included in your Project Plan will be summarised in the tool, as well as the deadline for when Payment Requests need to be submitted.

Please note, we intend to make payment of the grant within 40 days of approving your request but shall make the payment no later than 60 days of approving the request.

Activity costs

Activity costs need to be requested per activity (as outlined in your Project Plan). The earliest these can be paid is three months before the activity in question begins, but not before 1st September 2021. Please note:

- For any anticipated points of expenditure prior to 1st November 2021, a Payment Request does not need to be submitted – payments will be released automatically provided the payment requirements outlined in Annex 1 have been met.
- For any Anticipated Points of Expenditure from 1st November 2021 onwards, a Payment Request needs to be submitted via the LRT.

Organisational Support

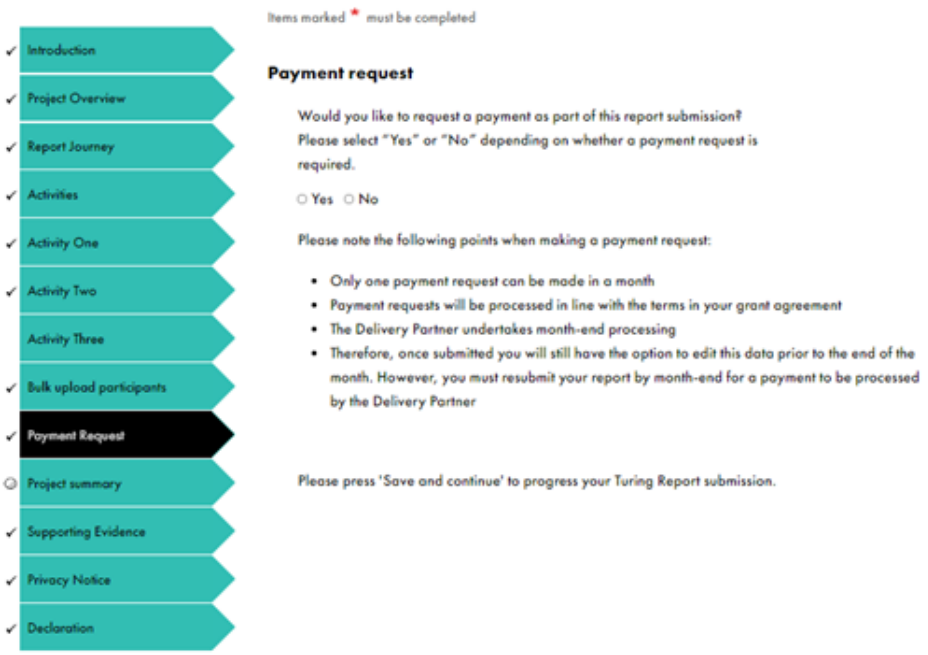
Organisational Support payments will be made available to cover the costs directly linked to the administration and implementation of a project. Under each project, £315 will be provided per participant for the first 100 participants. From the 101st participant onwards, £180 will be provided per participant.

One Organisational Support claim can be made per project, 80% of which is paid at the anticipated point of Organisational Support expenditure, with the final 20% paid on satisfactory receipt of your final report. Organisational Support can be paid up to six months before the earliest planned activity, but not before 1st September 2021. Organisational Support payments are released automatically based on your Project Plan, provided that the payment requirements outlined in Annex 1 have been met.

Making a Payment Request

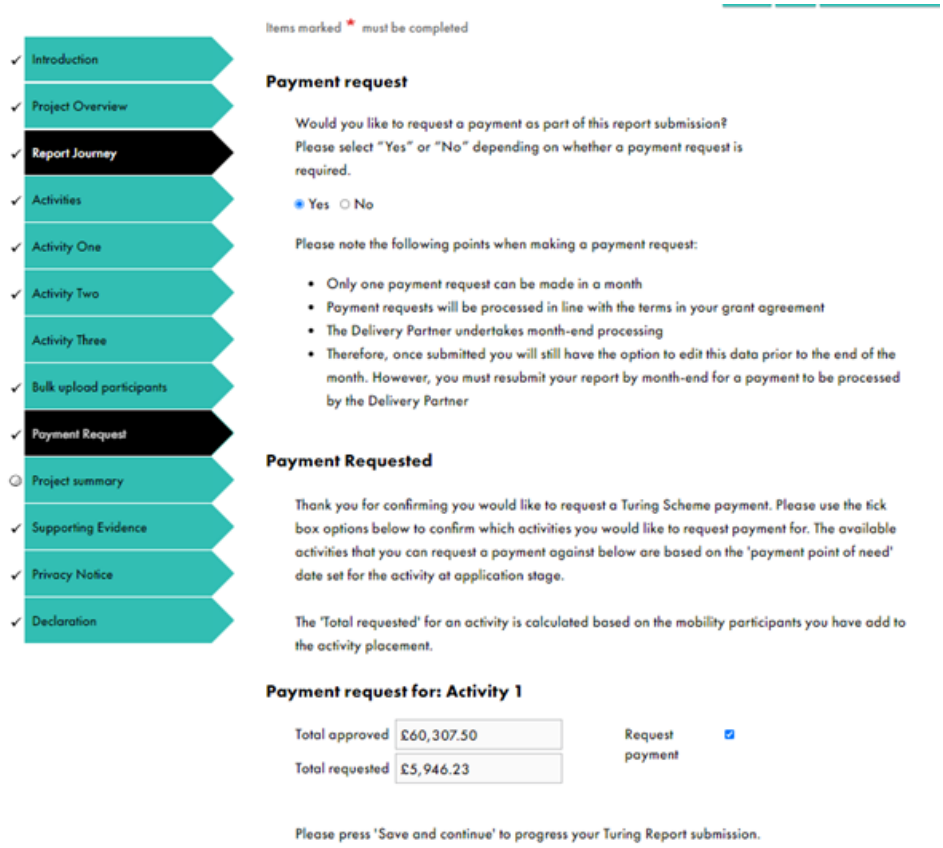
In order to make a Payment Request, you first need to add mobility participants to your report. For more information on how to do this, please see the 'Reporting' section.

1. Once you have finished adding mobility participants to the report, navigate to the Payment Request section as seen below. Two options will then be available:



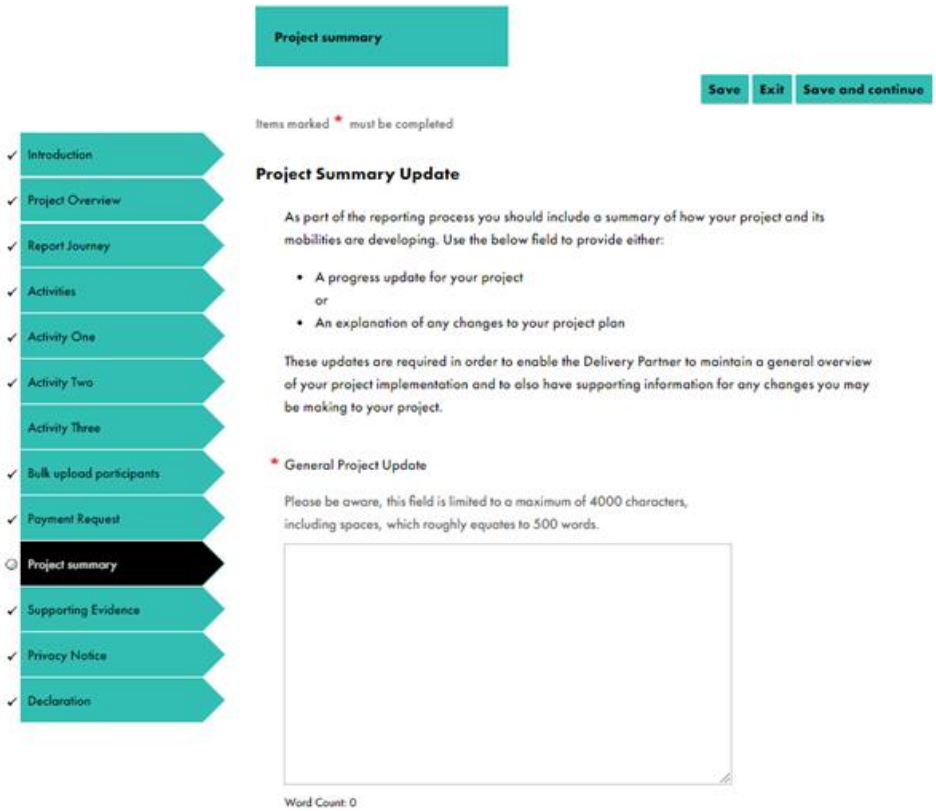
2. If you wish to make a Payment Request, select 'Yes'. This will then display all activities which you are currently eligible to make a Payment Request for.

3. Tick the 'Request payment' box on the activity or activities you wish to make a payment for as part of this report.



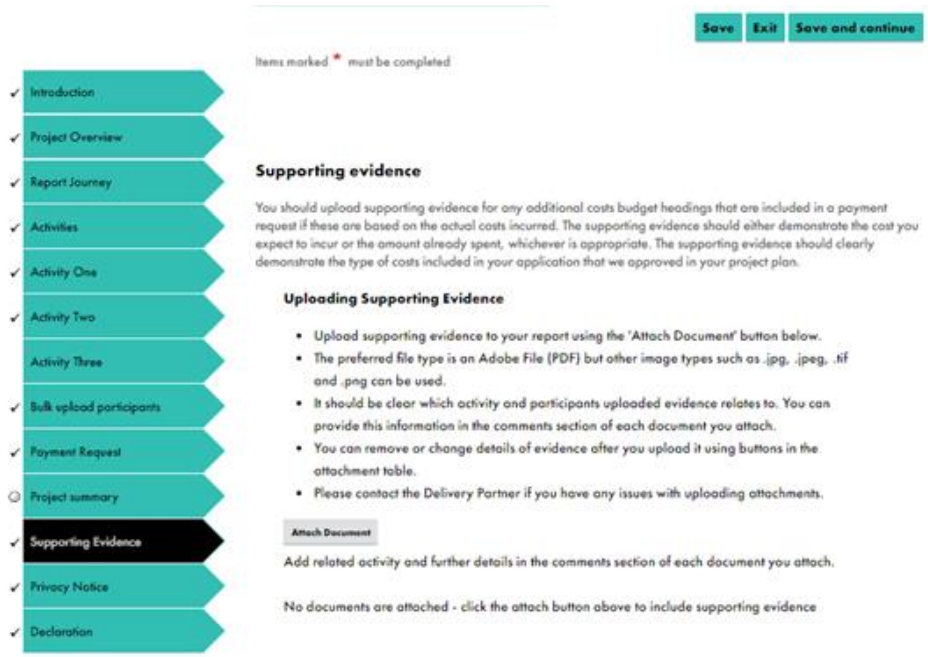
Project Summary

As part of your Payment Request and report submission, you must input a Project Summary Update. Simply enter your update in the box provided. If there is a change to any planned activity, please provide an explanation as part of your Summary.

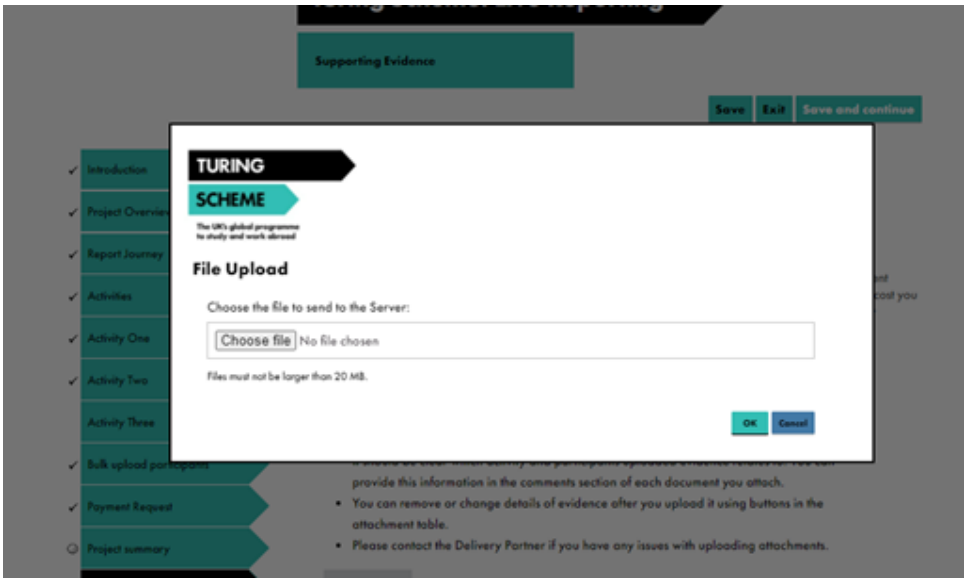


Supporting Evidence

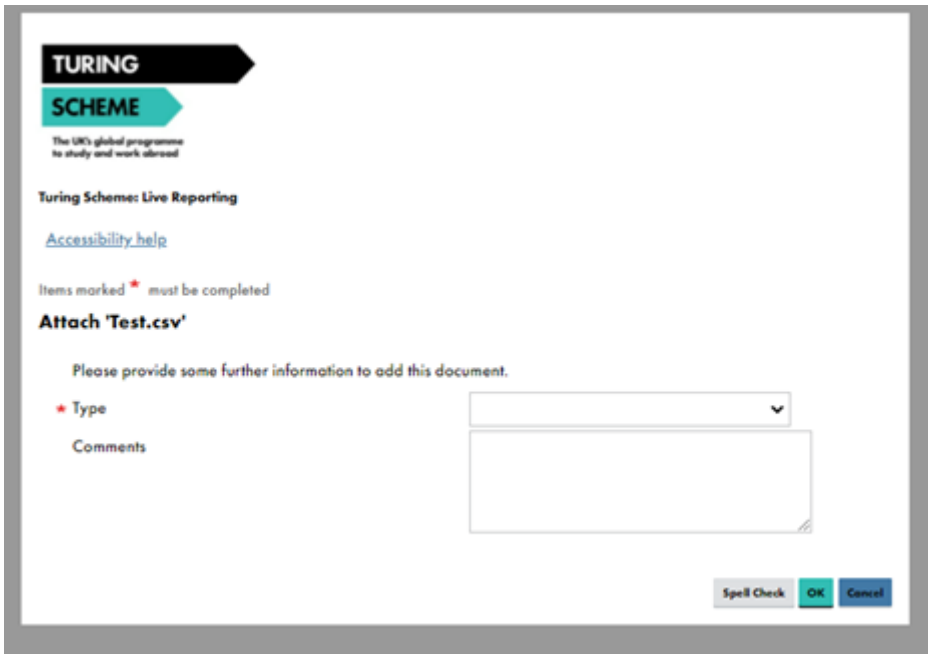
1. As part of the Payment Request process, you must upload supporting evidence if we request it. Please see Annex 1 of the Grant Agreement for more details. To upload supporting evidence, click on the 'Attach Document' button.



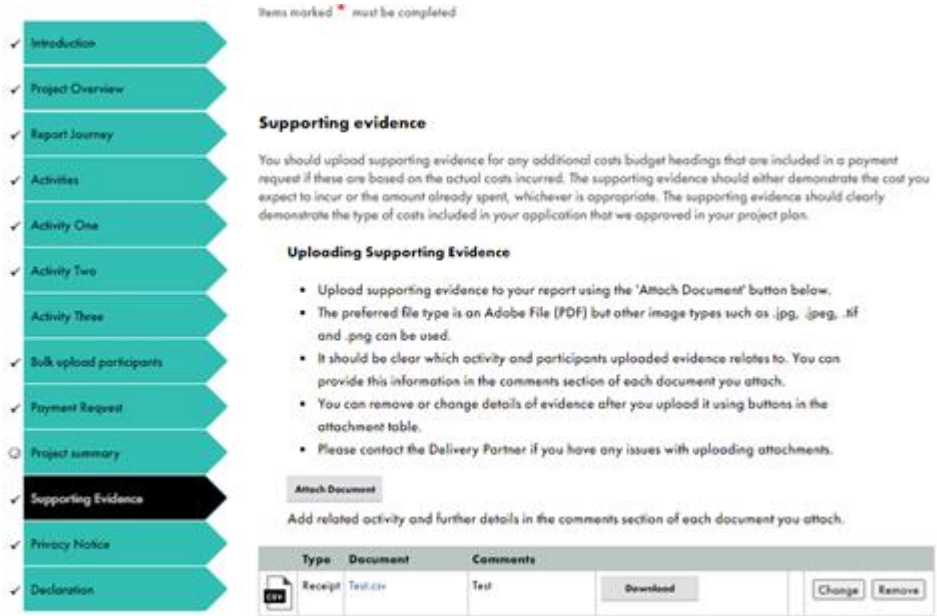
2. Select the file you wish to upload and press OK.



3. Select the type of file and input a comment which makes it clear what this attachment is evidencing as part of your report submission.

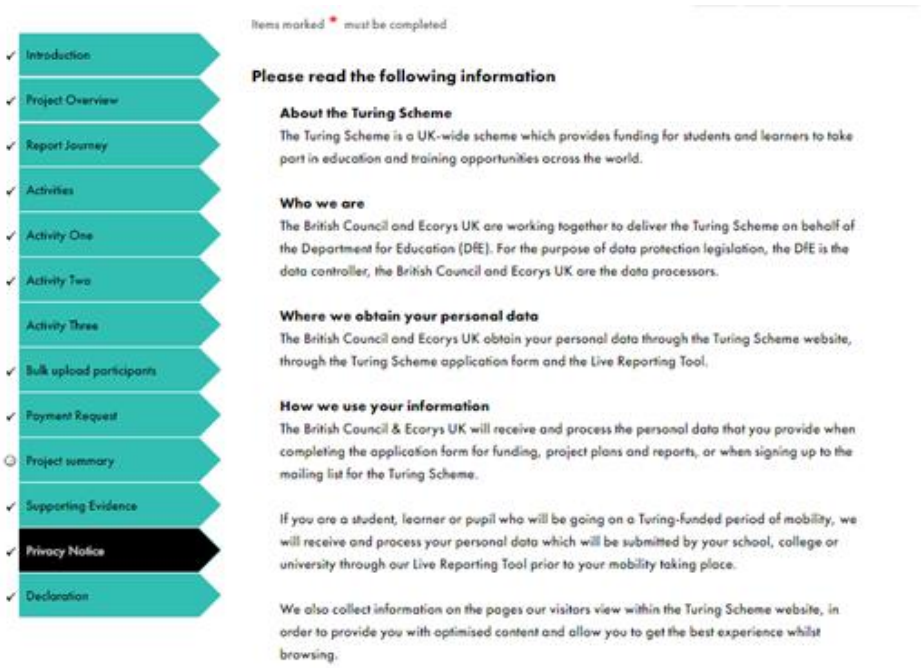


4. The attachment will now be displayed in the table. Repeat the process until all required attachments have been uploaded.

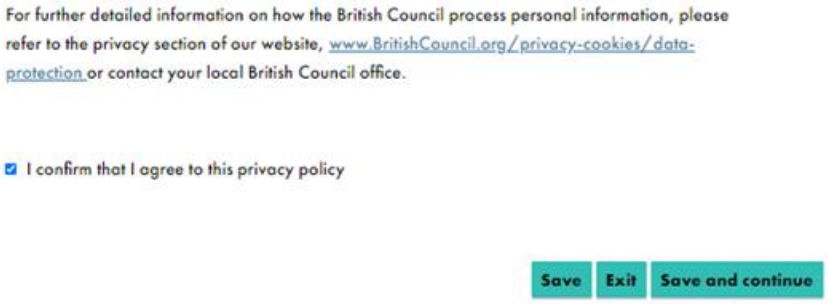


Privacy notice

1. You will need to complete the privacy notice as part of reporting. Please read through the privacy notice.

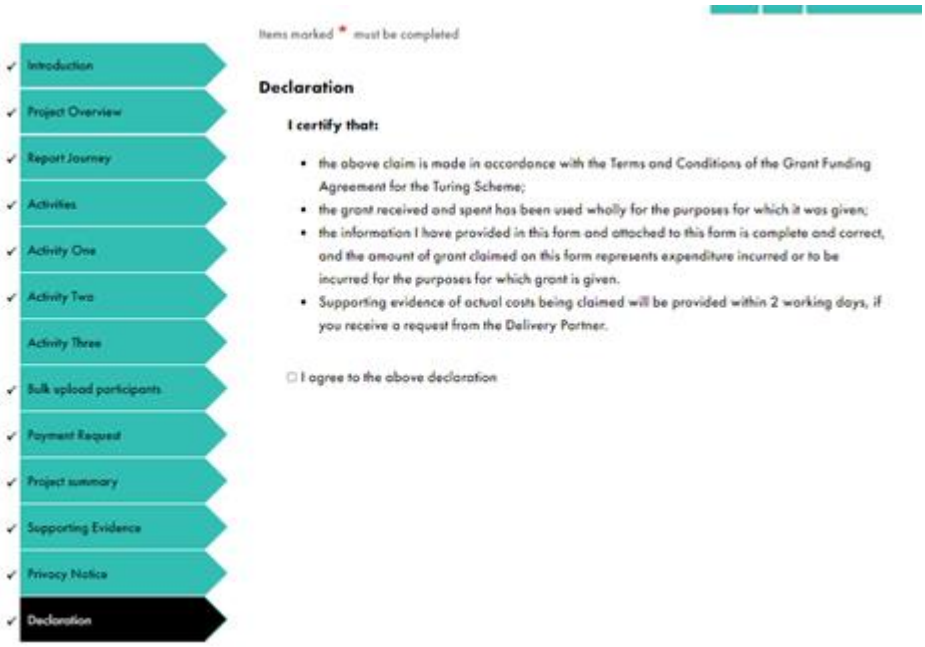


2. Tick the box at the bottom of the page to agree to the notice.

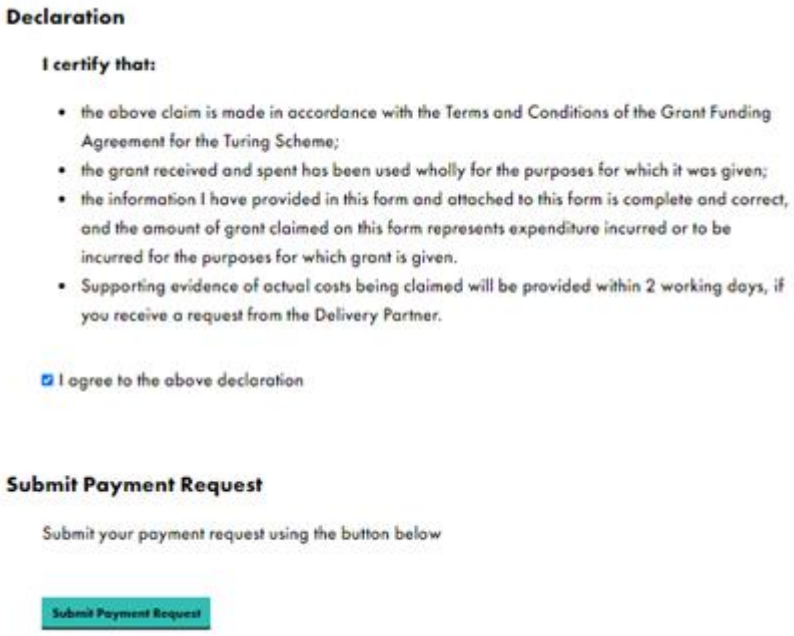


Declaration

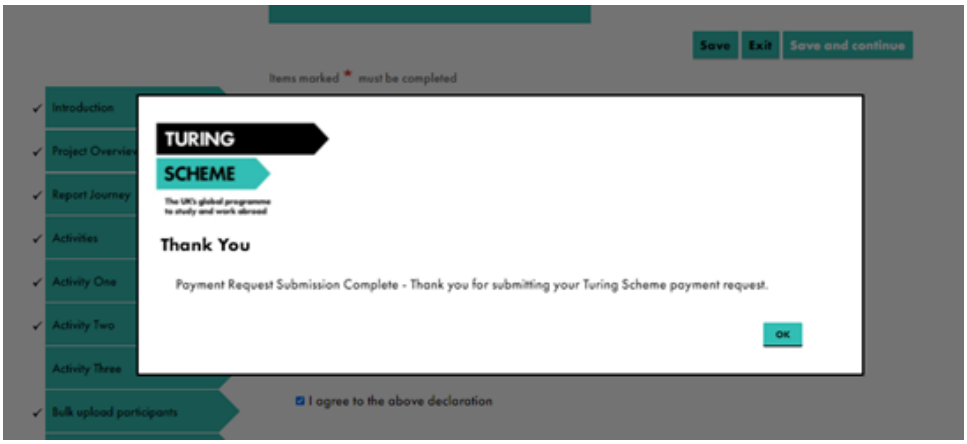
1. Please read through the declaration statement.



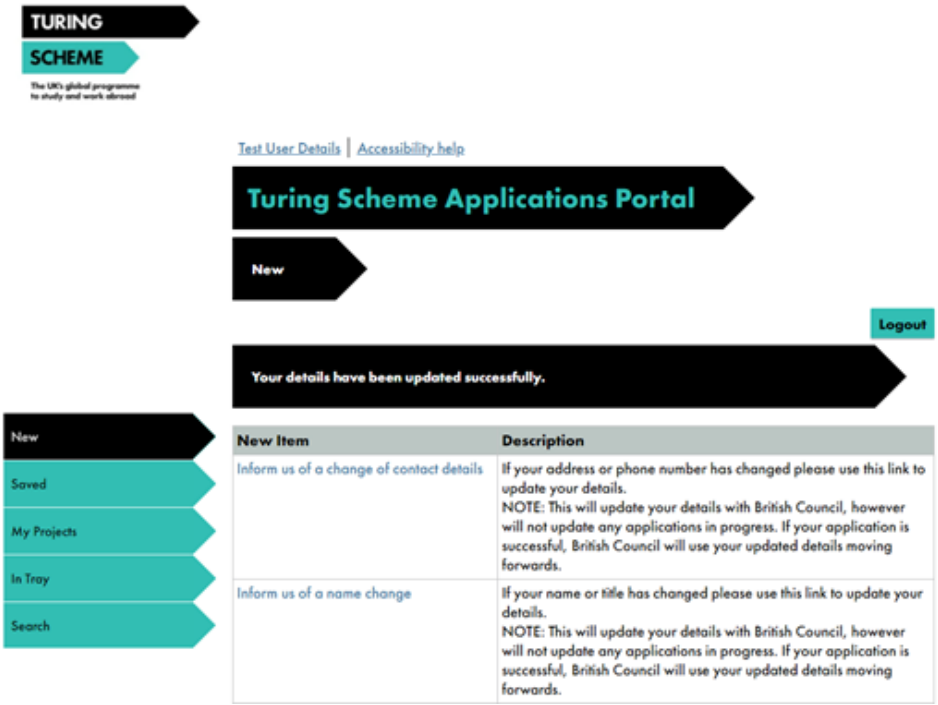
2. Tick the box to agree to the declaration, then click on the 'Submit Payment Request' button.



3. A confirmation message will be displayed on screen. Your report will enter a 'queued' stage and remain there until 23.59 on the last calendar day of the month. You may still edit your report up until that point.



4. Click on the 'OK' button, this will take you to the Applicant Workbench as shown below.



Late Payment Requests

Please note, if the Payment Request is late (but hits the deadline for the next month), then the payment will be made a month later than the original point of expenditure indicated in the application.

3. Activities

Period of activity

Projects can take place between 1st September and 31st August 2022 for all sectors.

Individual HE study mobilities may start before 1 September 2021 and end after 31 August 2022, if necessitated by term dates in other countries, but the majority of the mobility should take place between the dates set out above. Participants will only receive funding for the duration that takes

place during the eligible mobility window, and mobilities will still need to respect the programme's minimum and maximum durations during that window in order to be eligible for funding.

If your final project activity ends before 31 August 2022, you are encouraged to submit a final report within one month of that final mobility activity and close the project early and receive or return any remaining funding if applicable. For more information, please see the 'Reporting' section.

Early returns, short durations and interruptions of mobility periods

Early returns

If a participant returns early from an activity but meets the minimum duration requirement, you should report this change in the LRT. The Turing Scheme grant can cover only the actual period spent abroad and any overpayment must be returned to the project, except in the specific circumstances outlined below. Please see the 'Recoveries' section for more information.

Please note, where disadvantaged participants have to return early due to the COVID-19 situation in their host country, but they have incurred direct costs which are in excess of the cost of living they will receive for the actual period spent abroad, we will cover the actual, receipted costs incurred up to the limit of their originally planned cost of living budget for the mobility if the participant can demonstrate that these costs were incurred wholly as part of the mobility and could not be recovered when the placement had to end ahead of schedule due to Covid-19. Please see the 'Manage your Project' section of the website for more information on COVID-19 contingency funding.

Short durations

A short duration request is applicable for participants taking part in the Turing Scheme who do not meet the minimum duration required for their stay, due to force majeure.

Force majeure is defined as any event or occurrence which is outside the reasonable control of the Party concerned and which is not attributable to any act or failure to take reasonable preventative action by that Party. Therefore, short duration requests should not be submitted for mobilities that have not yet started. More information can be found in the Force majeure section.section.

Requests should be made only in clear and certain circumstances which are beyond the control of the participant, and which have an impact upon the participant's study / mobility progress or wellbeing. Generally, this will include:

- serious illness or injury, where a medical certificate states that the participant was unable to attend their studies or mobility;
- bereavement related to close family members such as parents or grandparents;
- major political upheaval or natural disaster in the host country requiring emergency travel and this has impacted the mobility;
- a traumatic experience which could include involvement in or witnessing of a serious accident, or witnessing or being the victim of a serious crime, and this has impacted on the participant.

We expect you to provide full evidence for the circumstances mentioned above. Force majeure does NOT cover:

- disputes between participants and receiving organisations that could potentially be resolved
- cancelled classes or study sessions by the receiving organisation
- participants simply wanting to return home
- foreseeable circumstances that could be resolved by either the participant, sending or receiving organisation

- labour disputes, strikes, financial difficulties or any default of a service, defect in equipment or materials or delays in making them available

Please note this list is not exhaustive and we look at each form on a case-by-case basis.

If a short duration request is approved you must amend the mobility record in the LRT to the actual dates spent abroad. The Turing Scheme grant only covers the actual period spent abroad and participants are only entitled to receive grants that correspond with the actual duration of the mobility. Any remaining funds must be refunded by requesting the difference from the mobility participant.

If you need to suspend a participant's mobility due to force majeure, the participant must be allowed to continue the activities after the interruption, provided that the mobility end date does not exceed the final date of the project.

If a short duration request is rejected, you must delete the mobility record from the LRT and return the grant to the project by requesting the difference from the mobility participant.

Interruptions

If a participant undertakes an activity not related to their mobility, this will not be funded and will be deducted from the mobility duration. Please ensure that a mobility with interruption days still meets the minimum duration for the relevant mobility.

Selection of participants

You, as the beneficiary, are solely responsible for selection of participants. The selection process must be fair, transparent, coherent, documented and shall be made available to all parties involved. The profile of participants must correspond to the eligibility criteria set out in the Turing Scheme Programme Guide.

Participant Agreement

The Turing Scheme does not provide templates for agreements between the sending organisation and its participants (or guardians of participants under 18 years of age). However, we recommend that each participant has a signed Participant Agreement which formally accepts their grant and acknowledges the obligations associated with its acceptance. If you choose to use a Participant Agreement, we recommend that these are signed by all parties no later than one month after the mobility start date.

The agreement should be retained as a record of the mobility.

Participant Learning Agreement

The sending organisation, the receiving organisation, and the participant should also consider signing a Learning Agreement, which should provide a transparent and detailed breakdown of the study period abroad.

We recommend that the Learning Agreement includes the educational components to be carried out by the participant at the receiving organisation, as well as a mechanism for tracking progress against each of these components.

Paying participants

Payments should only be made when the participant is likely to require funds. Sending organisations should apply their payment processes consistently throughout the lifetime of a project.

Partial funding or zero grant award months are not possible under the Turing Scheme. The only exception is if a participant goes on a mobility where term dates fall outside the eligible period for funding (1st September 2021- 31st August 2022). Whilst in this case the majority of the mobility would have to fall inside the eligible period of funding, and funding is only provided in relation to this period, it is possible for the participant to travel to their Turing Scheme destination outside of the eligible period of funding and for this time to be counted as zero grant award months.

Additional support is available for disadvantaged participants who incur additional costs as a result of COVID-19 for placements during the 2021-22 Academic Year. These costs are to be claimed separately to the main Turing Scheme grant. Please see the 'Manage your Project' section our website for more detailed guidance on the COVID-19 contingency fund.

4. Budget

The grant funding is split into several different budget categories, details of which can be found below.

Organisational Support

You may decide how the Organisational Support (OS) grant is to be used, provided it is used on agreed activities related to the agreed activities.

Organisational Support is a contribution to any cost incurred by you in supporting activities, including, but not limited to:

- organisational arrangements with partner organisations
- providing information and assistance to participants
- selection of participants and accompanying persons
- preparation of the learning agreements to ensure full recognition of the students' educational components; preparation and recognition of mobility agreements
- ensuring an efficient mentoring and supervision arrangements for participants
- ensuring recognition of the educational components and related credits, issuing transcript of records and diploma supplements
- supporting the reintegration of mobile participants and build on their acquired new competences for the benefit of the sending organisation and peers

Cost of living

Funding is available to contribute towards the general cost of living for each participant across all sectors. Rates vary depending on the duration of the mobility and the destination country, which is grouped in one of three categories: Group 1 (high cost of living), Group 2 (medium cost of living) and Group 3 (lower cost of living).

For a full breakdown of cost-of-living grant rates for your sector, please see the 'Eligibility and Grant Rates' section of the Programme Guide.

The full list of country/territory groups is as follows:

Group 1	Group 2	Group 3
American Samoa	Africa not otherwise specified	Afghanistan

Australia	Andorra	Albania
Bahamas	Antarctica and Oceania not otherwise specified	Algeria
Barbados	Antigua and Barbuda	Angola
Bermuda	Austria	Argentina
Canada	Belgium	Armenia
Cayman Islands	Belize	Azerbaijan
Cook Islands, Tokelau and Niue	Brazil	Bahrain
Cuba	British Indian Ocean Territory	Bangladesh
Israel	British Virgin Islands	Belarus
Japan	Bulgaria	Benin
Kiribati	Canary Islands	Bhutan
New Caledonia	Caribbean not otherwise specified	Bolivia
New Zealand	Central America not otherwise specified	Bosnia and Herzegovina
North America not otherwise specified	Cote d'Ivoire	Botswana
Papua New Guinea	Croatia	Brunei
Puerto Rico	Curaçao	Cambodia
Samoa	Cyprus	Cameroon
Solomon Islands	Czech Republic	Cape Verde
Switzerland	Denmark	Central African Republic
Tonga	Egypt	Chad
Turks and Caicos Islands	Estonia	Chile
United States	Europe not otherwise specified	China
Vanuatu	European Union not otherwise specified	Colombia
Venezuela	Falkland Islands	Costa Rica
	Faroe Islands	Democratic Republic of the Congo
	Finland	Dominica
	France	Dominican Republic
	French Guiana	Ecuador
	Germany	El Salvador
	Gibraltar	Eswatini
	Greece	Ethiopia
	Hong Kong	Fiji
	Hungary	The Gambia
		Georgia
		Ghana

	Iceland Ireland Italy Laos Latvia Liechtenstein Lithuania Luxembourg Malta Martinique Monaco Netherlands North Macedonia Norway The Occupied Palestinian Territories Poland Portugal Romania Serbia Slovakia Slovenia South Georgia and The South Sandwich Islands South Korea Spain St Kitts and Nevis St Lucia St Vincent and The Grenadines Svalbard and Jan Mayen Sweden Turkey Uruguay	Guinea Guyana Haiti Honduras India Indonesia Iran Iraq Jamaica Jordan Kazakhstan Kenya Kosovo Kuwait Kyrgyzstan Lebanon Liberia Libya Macao Madagascar Malawi Malaysia Maldives Mali Mauritania Mauritius Mexico Moldova Mongolia Montenegro Morocco Mozambique Myanmar (Burma) Namibia Nepal

		Nicaragua Nigeria Oman Pakistan Panama Paraguay Peru Philippines Qatar Russia Rwanda Saudi Arabia Senegal Seychelles Sierra Leone Singapore Somalia South Africa Sri Lanka Sudan Taiwan Tajikistan Tanzania Thailand Togo Trinidad and Tobago Tunisia Uganda Ukraine United Arab Emirates Uzbekistan Vietnam Zambia Zimbabwe

Travel expenses

A contribution to the cost of travel is available for the following participants:

- Higher education – disadvantaged participants (see Annex A of the programme guide for a full definition)
- Schools - all participants
- FE/ VET - all participants

The travel grant amount is calculated by the distance between the receiving organisation and sending organisation, and goes towards the cost of the round trip. All amounts available have been outlined below:

- 10 to 99km: £20
- 100 to 499km: £165
- 500 to 1,999km: £250
- 2,000 to 2,999km: £325
- 3,000 to 3,999km: £480
- 4,000 to 7,999km: £745
- 8,000 to 12,000km: £905
- 12,000km+: £1,360

Please use Google Maps to calculate distance. You will need to follow the below steps:

1. Right-click on your starting location.

2. Choose 'Measure distance'.

3. Click on your destination to create a path to measure.

Exceptionally expensive travel

Financial assistance is available for exceptionally expensive travel, but only for participants who qualify for the standard travel grant. This funding is specifically to support expensive travel if applicants can justify that the standard funding for travel under the Turing Scheme does not cover at least 80% of the travel costs of participants.

Participants from a disadvantaged background

Participants from less advantaged backgrounds will also receive funding for exceptionally expensive travel costs. Please see Annex A of the Programme Guide for a full definition of disadvantaged participants under the Turing Scheme.

Exceptional costs are calculated on an actual cost basis and are specifically for any additional costs incurred to support the participation of disadvantaged participants. Funding covers costs such as passports/ visa/ insurance/ appropriate clothes/ luggage as necessary. Please note, it is ultimately at the discretion of the individual sending organisation how it uses the payment for disadvantaged students, referring to any measures already taken internally to ensure parity.

There is also support is available for disadvantaged participants who incur additional costs as a result of COVID-19. These costs are to be claimed separately to the Turing Scheme grant. Please see the 'Manage your Project' page for more detailed guidance on COVID-19 contingency funding.

Disadvantage uplift (Higher Education only)

Higher Education (HE) participants from a disadvantaged background will receive an additional £110 per month to their cost-of-living grant. To see how this affects the standard cost of living rates, please see the Grant Rates section for the HE sector within the Programme Guide.

Additional educational needs support

For participants with special educational needs and disabilities (SEND), the scheme will fund up to 100% of actual costs for support directly related to their additional needs. This funding can also cover pre-mobility visits by the sending organisation to carry out risk assessments and ensure participants will be able to equally access and take part in all elements of a mobility. Pre-visits can be for a maximum duration of three days, and funding can be used for both learners and accompanying staff. Pre-visits are not available for any other purpose.

For more information on how SEND is defined as part of the Turing Scheme, please see Annex A of the Programme Guide.

Linguistic support (FE/VET only)

Linguistic support refers to language preparation for mobilities over 19 days, undertaken by learners before their mobility starts. Linguistic support is provided in the form of a financial grant (£135 per participant) to cover expenses such as classroom courses or learning materials for the language used within the host organisation, as well as day-to-day vocabulary in the language of the host country, to ensure learners will be ready to live and work in a different environment and in a different country. Linguistic preparation plans must be relevant and appropriate to the participant's FE or VET qualification, as well as proportional to the length of their mobility.

5. Making changes to your project

You can make changes to your project throughout its delivery where these are needed. Any changes made should not change the fundamental aims and objectives that were outlined as part of your application.

Change of project coordinator or legal representative

If the coordinator or legal representative changes during the project, please send an updated version of the Turing Scheme Contact Details form (Annex 7) to turing.scheme@britishcouncil.org (HE and Schools) or turing-scheme@ecorys.com (FE/VET) as soon as you are aware of a change.

For a legal representative change, you must also attach a letter of appointment from your HR department to confirm the new signatory has the authority to sign legal documents on behalf of the organisation.

Consortium changes

For Schools or FE/ VET consortium projects, if you wish to add a new partner to an existing consortium, we will need to approve this amendment. . We will assess the implications of the change to the consortium, check that all eligibility criteria have been fulfilled and that there is no impact on the overall scope and quality of the consortium before confirming our decision.

Budget transfers

For the purposes of making changes to your project, your budget is split into the following two categories:

Activity budget categories – these are at activity-by-activity level, rather than the whole project:

- learner cost of living support

- learner travel costs
- participant numbers
- accompanying person numbers

Project budget categories – these are across the whole project:

- Organisational Support costs
- exceptionally expensive travel
- exceptional costs
- additional educational needs support costs
- disadvantaged uplift costs
- linguistic support budget

Changes possible without our approval

Beneficiaries may change activity dates or countries within the same country group without needing approval

Beneficiaries can make the following changes between **activity** budget categories without needing approval

- increase or decrease numbers of participants / accompanying persons for each activity, up to and including 10% of the original number for each activity
- increase or decrease cost of living and travel budget for each activity, up to and including 10%

Beneficiaries can make the following changes between **project** budget categories without needing approval

- decrease the Organisational Support budget by up to and including 10%. Please note, Organisational Support cannot be increased.
- Increase or decrease each additional cost category (exceptionally expensive travel, exceptional costs, additional support for education needs costs, disadvantaged uplift costs (Schools and FE/VET only), linguistic support budget, if applicable) by up to and including 10%.

The threshold for changes the Grant Recipient can make to their Project without seeking approval from the TSA is set to 0% for any changes that move funding intended for disadvantaged participants to non-disadvantaged participants. This applies at both activity budget and project budget levels.

Please note: these changes must be submitted via the Live Reporting Tool thirty (30) days prior to any Payment Request. In exceptional circumstances, if it's not possible to adhere to the thirty (30) day notice period, or if you identify a necessary change to a part of your project they have already received grant funding for, the change must be submitted via the Live Reporting Tool as soon as possible.

Changes needing our approval

If you intend to make changes beyond the 10% approval threshold of individual budget categories mentioned above, please request approval by emailing turing.scheme@britishcouncilorg (HE and Schools) or turing-scheme@ecorys.com (FE/VET) with the following details:

- organisation name
- project reference (URN)
- budget category transferring from

- budget category transferring to
- amount/ percentage
- reason

Examples

Higher Education

Scenario 1: One activity with a single mobility

10 participants on a four-week mobility to Hungary (Group 2) = £4,800

Action needed – adding one participant.

Process: Adding a participant would cost an extra £480, which is equal to 10% of the activity budget. This change would not need approval.

Scenario 2: One activity with two mobilities

10 participants on a six-week mobility to Japan (Group 1) = £8,175

10 disadvantaged participants on a six-week mobility to Kenya (Group 3) = £8,850

Overall cost = £8,175 + £8,850 = £17,025

Action needed – removing two disadvantaged participants from Kenya mobility and adding two non-disadvantaged participants to the Japan mobility.

Process: The threshold for removing funding allocated for disadvantaged participants is 0%. This change would need approval.

FE/VET

Scenario 1: One activity with two mobilities

Five participants on a two-month mobility to New Zealand (Group 1) = £25,110

Three participants on a one-month mobility to Bulgaria (Group 3) = £7, 116

Overall cost of living budget for the activity: £25,110 + £7,116 = £32,226

Action needed: Increase the duration of the New Zealand mobility by one week.

Process: Five participants for an additional week would cost an additional £2,660 – this change can be made without approval as it is less than 10% of the overall cost of living grant for this activity.

Scenario 2: One activity with a single mobility

Nine participants on a 14-day mobility to Austria (Group 2) = £11,844

Action needed: Add one participant.

Process: This would cost an additional £1,316 in the cost-of-living category. This would need our approval, as the overall amount for the category will have increased by over 10%, as well as the number of participants being increased by over 10%.

Schools

Scenario one: Project with 200 total participants. The Organisational Support budget is £4,950.

Desired Action: Decrease the OS budget by £400 to go towards expensive travel, which has a budget of £5,000.

Process: £400 would decrease the OS budget by less than 10%, and increase the Expensive Travel budget by under 10%, therefore this change could be made without our approval.

Scenario two: All participants are taking part in mobilities taking place within the same month (activity), with an overall cost of living grant of £74,200 (based on each participant undertaking a seven-day mobility).

Request: Increase cost of living grant for this activity by £8,000.

Process: This change would need our approval. £8,000 is over 10% of the original cost of living grant.

6. Health and safety

We may request evidence that the appropriate safeguarding and health and safety steps have been taken. Any non-compliance or issues in this area may result in us taking further action, which could include the termination of the grant agreement.

All participants should have the opportunity to take full advantage of the possibilities for personal and professional development and learning. This should be provided in a safe environment which respects and protects the rights of all persons. Therefore, you must have effective procedures and arrangements in place to promote and guarantee the safety and protection of your participants in their activity.

Insurance

You should establish whether the receiving organisation has insurance that covers participants during their mobilities. In cases where existing insurance does not provide this type of cover, you should ensure that additional insurance is taken out for the period of the activity.

We do not define a unique format of insurance, nor recommend specific insurance companies; this is to be decided by the sending organisation. However, we strongly advise that you have medical and travel insurance for the duration of your time abroad, including travel to and from the UK. If applicable, it is strongly recommended that participants are in possession of either a European Health Insurance Card (EHIC) or a UK Global Health Insurance Card (GHIC).

If you have an existing EHIC, it will remain valid until the expiry date on the card. You can apply for a new card up to six months before your current card expires. General information on how to apply for health care cover abroad can be found on the NHS website. GHIC is not valid in Norway, Iceland, Liechtenstein or Switzerland. A GHIC or an EHIC card cover some medical care in the European Union (EU) but they do not replace travel insurance.

Travel advice

For all the latest travel guidance, please visit the 'Manage your Project' section on our website.

Safeguarding

All sending organisations have a responsibility to safeguard and promote the welfare of participants under the age of 18, and it is your responsibility to ensure that you adhere to the relevant statutory and non-statutory safeguarding guidance relating to your sector, and nation, and that under 18-year-olds are safe on this international exchange.

You also need to consider the safeguarding requirements of your nation. For England, key statutory guidance we expect to be followed includes 'Keeping Children Safe in Education' (KCSIE) guidance. For Wales, key statutory guidance expected to be followed is 'Keeping Learners Safe' (KLS). For Northern Ireland, the key guidance expected to be followed for schools is 'Safeguarding and Child Protection in Schools' and 'Northern Ireland Further Education Colleges Policy Framework, Safeguarding, Care & Welfare Policy' for the FE sector. For Scotland, the key statutory guidance expected to be followed is the Child Protection and Safeguarding Policy. We also have the expectation that sending organisations comply with relevant UK legislation and relevant legislation in the country of each partner when planning and executing a mobility.

All participating organisations should have procedures in place for organising off-site educational visits. Organisations wishing to participate in the Turing Scheme must have in place:

- an up-to-date safeguarding or child protection policy
- a code of conduct
- a clear mechanism for reporting any safeguarding concerns

An individual at the top level within the organisation must take responsibility for child protection arrangements, including the commissioning or provision of services. The Child Protection Policy must either be signed by the most senior person in the organisation or approved or ratified by an Executive Board where applicable, and it must be written clearly, and be accessible and available to all stakeholders, including children.

A safeguarding checklist has been sent to all successful Turing Scheme applicants (Annex 8 of the Grant Agreement). This must be completed, signed and returned to us by email before the activity in question takes place, if any participants under the age of 18 are part of the project activity. Visit leaders must have met with the designated safeguarding lead (or equivalent) and considered the arrangements which need to be in place in both countries to ensure the wellbeing of all pupils, including a clear referral pathway to report any concerns.

Please see the Programme Guide for more detail on safeguarding procedures, and areas to address before a mobility.

7. Reporting

All Turing Scheme projects include the submission of different types of reports throughout the project lifecycle. All projects will require the submission of reports for Payment Requests and a final report. Your Grant Agreement includes information on the reporting requirements and the deadlines for submission.

Submitting reports is a contractual requirement of your project. Failure to submit reports may result in your project being suspended or terminated and a recovery of your grant.

Live Reporting

Live reporting plays a key role in the delivery of your projects, and serves two primary functions, to facilitate payment and to monitor the progress of the project against the approved project plan.

Live reporting is the action of adding in mobility data to generate the budget of an activity and in turn the overall project. Live reporting happens via the Live Reporting Tool.

You will need to use live reporting to generate your Payment Requests (from September 2021 onwards). These will occur at specific points in your project, set out in your project plan. Failure to submit a Payment Request will result is delayed or missed payments.

Once mobilities have started, live reporting is a mandatory requirement and must be completed on a monthly basis throughout the project lifecycle. This is necessary in order to allow us to see whether

the participant data entered into the Live Reporting Tool is still accurate and whether the project expenditure is going ahead as anticipated, e.g. allowing us to see if there any participant dropouts, or changes to receiving organisations. Failure to complete monthly live reporting will trigger a chase process and may lead to future funding being withheld.

The below Report Journey will help guide you when entering live reporting information.

Report Journey

The Report Journey section describes what the Live Reporting Tool (LRT) will be used for and what you will be required to provide as part of a report submission.

Activity

Each activity has its own section in the report, there will be between one and 12 activities displayed in the report depending on the amount submitted in your original grant application form.

Each activity is broken down into the following areas:

Activity Financial Overview

The table below displays the same details as the table in the Project Overview section, the only difference being it is just for the single activity.

	Approved budget	Reports approved to date	Remaining budget	Latest request
Exceptional travel	£2,000.00	£0.00	£2,000.00	£0.00
Exceptional costs	£0.00	£0.00	£0.00	£0.00
Additional educational needs support costs	£1,500.00	£0.00	£1,500.00	£0.00
Disadvantaged uplift costs	£3,355.00	£0.00	£3,355.00	£0.00
Linguistic support budget	£0.00	£0.00	£0.00	£0.00
Learner cost of living support	£48,238.00	£0.00	£48,238.00	£0.00
Learner travel costs	£5,215.00	£0.00	£5,215.00	£0.00
Accompanying person cost of living support	£0.00	£0.00	£0.00	£0.00
Accompanying person travel costs	£0.00	£0.00	£0.00	£0.00
Total	**£60,308.00**	**£0.00**	**£60,308.00**	**£0.00**

Activity Mobility Participants

The table below displays the same details as the table in the Project Overview section, the only difference being it is just for the single activity.

	Approved number of participants	Latest request	Difference
Activity one			
Total number of mobility participants	**25**	**0**	**25**
Students	25	0	25
Disadvantaged backgrounds	7	0	7
SEND	7	0	7
Total number of accompanying persons	**0**	**0**	**0**
Total	**25**	**0**	**25**

Cost of living

The information in this section is taken from your approved Turing Scheme grant application.

It details the following:

- activity start month – the month in which you planned for the activities to start
- payment point of need – the number of months before the activity start month by which you need to receive the grant payment
- activity table – the table displays the data input in the cost of living table from your approved grant application

Activity start month

1 October Year 2021

Payment point of need

3 month before activity start month

	Activity ID	Learner participants	Accompanying participants	Start Date	End Date	Activity Type	Country	Total cost	
Select Activity	1	15	0	1/10/2021	21/1/2022	Learner Mobility Traineeship	Barbados	£27750.00	Edit
Select Activity	2	10	0	1/10/2021	25/2/2022	Learner Mobility Study	Azerbaijan	£20487.50	Edit

Clicking 'Edit' on one of the activities displays a more detailed overview of the activity as seen below:

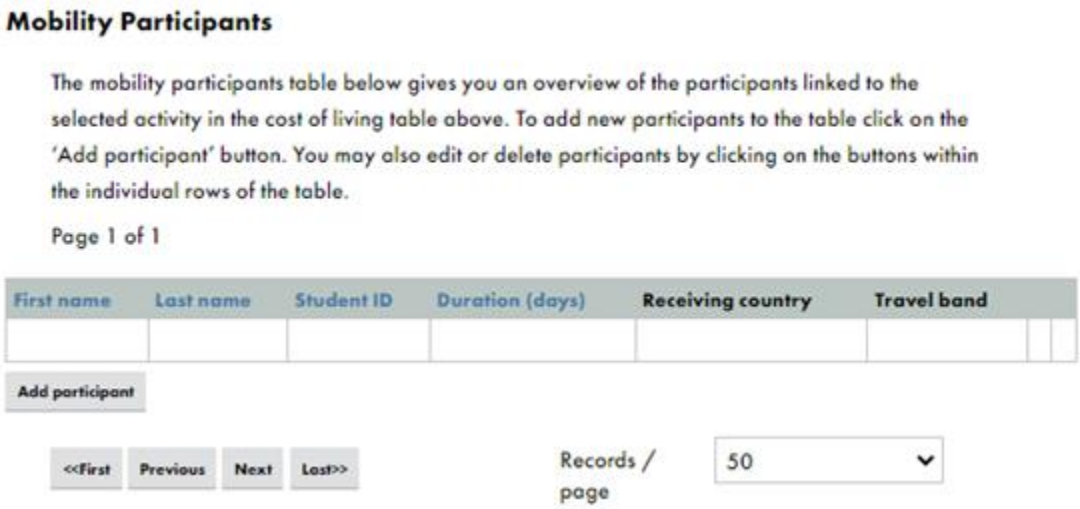
Cost of living

Funding Stream Type	Higher Education
Activity type	Learner Mobility Traineeship
Number of learner participants	15
Number of accompanying participants	0
Number of disadvantaged	5
Number of send learners	5
Duration	4 months
* Start date	1 October Year 2021
End date	21 January Year 2022
Group	Group 1
Country	Barbados
Distance band	10-99km - £20.00 100-499km - £165.00 500-1999km - £250.00 2000-2999km - £325.00 3000-3999km - £480.00 4000-7999km - £745.00 8000-12000km - £905.00 12000km+ - £1360.00 4000-7999km

Mobility Participants

By clicking 'Select Activity' on one of the rows in the table in the cost-of-living section, the Mobility Participants section is displayed as shown below.

This table will show all mobility participants that have been added to the selected Activity ID in the cost-of-living table.



Clicking on the 'Add participant' button will display a new window in which you may input the details for a participant, whether this be a learner or an accompanying participant. See the screenshots on the next two pages for the information to be captured as part of adding a new participant.

TURING SCHEME

The UK's global programme to study and work abroad

Forename Surname Details | Accessibility help

Add Rows

Add | Add & close | Cancel

Items marked * must be completed

Mobility Participant details

* First name
* Last name
* Date of birth — Day / Month / Year
* Student ID Number (Participant ID) — HUSID or ULN for Students

You must provide an ID for each participant (students or accompanying persons). For example, use HUSID for HE students & ULN for FE students. If a participant does not have a unique ID you must assign one for that participant, and use the same ID for that participant in future reporting.

Participant identifiers are used in validation checks, so must be able to uniquely identify a single individual.

Postcode (optional) — Enter the postcode prior to study

Mobility dates

Enter the start and end date of mobility, which must not be outside 01/09/2021 - 31/08/2022.

* Mobility start — dd / mm
* Mobility end — dd / mm

Mobility duration (days) — Calculated based on the mobility dates provided

Further information

* Domicile / Home country
* Ethnicity
* Gender
* Level of education
* Field of education
* Profile type

Contact info

Enter the participant or accompanying persons' email address and telephone number

* Email address
* Please re-enter email address
* Telephone number

Sending organisation

To be pre-filled using the application data

* Organisation type
* Organisation name
* Organisation Country
* Registered office address line 1
  Registered office address line 2
* Organisation Town/city

Receiving organisation

* Receiving Organisation type
  ☐ Other
* Receiving Organisation name
* Receiving Organisation Country
* Receiving Organisation Registered office address line 1
  Receiving Organisation Registered office address line 2
* Receiving Organisation Town/city

Financial

Cost of living support

Travel costs

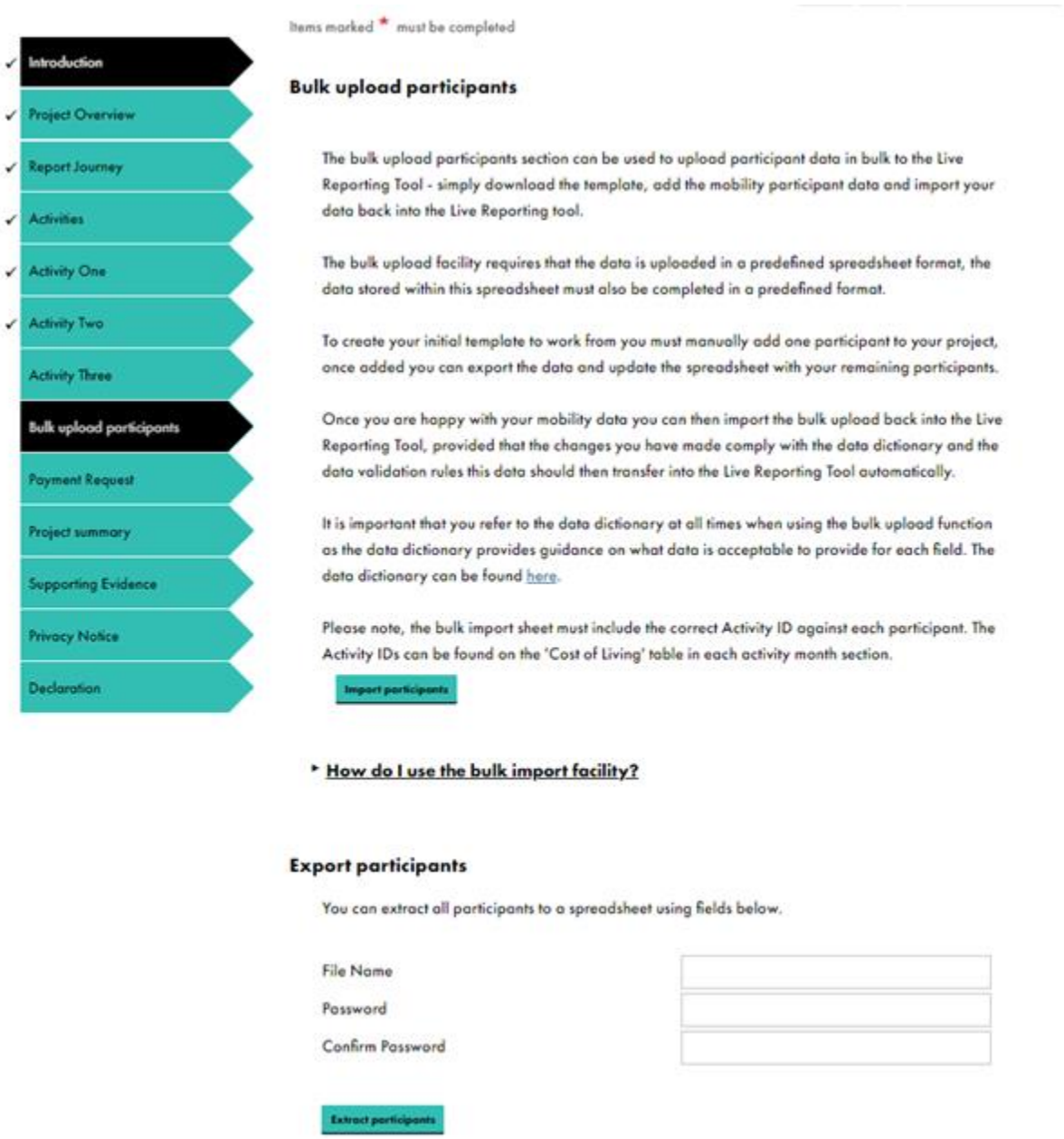
Grant amount total

Add | Add & close | Cancel

Bulk upload participants

This section is used firstly for exporting participants that have been input to date in the LRT, and then for re-importing the same spreadsheet with new participants added, or edits made to existing participants.

A link is included in the guidance text on screen to the data dictionary which must be referred to before any importing takes place.



Participant reports

Information about the content and submission process for participant reports will be provided in a later version of the handbook.

Final reports

At the latest, the final report must be submitted within 28 days of the project end date but can submitted as soon as all project activities have been completed.

Information about the participants, the nature, destination and duration of their mobilities, and any additional costs will have been reported via the Live Reporting Tool as part of the Payment Request process. This information will be assessed against the information provided at the application stage and used to determine the final grant.

Approval of the final report will trigger a final payment of the remaining eligible funding of up to 20% of the grant, if applicable. It may also trigger a request for reimbursement, should you not have spent the full amount of the grant you have already received.

Grant Recipients (excluding local authorities and Maintained Schools) in receipt of grants in excess of £40,000 will be required to provide independent assurance through the completion of Annex 9 (Annual Certification of Expenditure) which is to be signed by a reporting accountant who is independent to the Grant Recipient. This is to be submitted alongside the final report.

Local Authorities and Maintained Schools in receipt of grants in excess of £40,000 will be required to complete Annex 10 – Statement of Grant Usage, which is to be submitted alongside the final report.

Detailed information about the content and submission process for the final report will be provided in a later version of the handbook.

8. Compliance and audit

We may select you for an assurance check audit to assess your compliance with Turing Scheme rules and the terms set out in the Grant Agreement. Projects will be selected for assurance check audits both randomly and as targeted audits. There are three types of assurance check audit:

- Desk check audits are undertaken remotely on the organisation's project activity.
- On-the-spot-check during audits are an on-site visit by the compliance team to an organisation **during live project activity**. This audit is a review of the project and the organisation, reviewing their original records and interviewing staff.
- On-the-spot-check after audits are an on-site visit by the compliance team to an organisation **after the project closure.** This audit is a review of the project and the organisation, reviewing their original records and interviewing staff.

The assurance checks will inspect your compliance with the financial and programme management rules by checking relevant records and the management practices. The assurance checks will audit the following areas: general administration of the Turing Scheme, banking arrangements for Turing Scheme grants, evidence and recording of transactions, timing and procedures for payments, eligibility, travel, evidence of activities / meetings, special needs costs (if applicable) and exceptional costs (if applicable).

Desk checks

Desk checks are the lowest level of compliance check They are administered remotely, via electronic and hard copy documentation, by our compliance staff.

Projects requiring desk checks are selected at random, however, a project can be subject to one if they are identified as being higher risk or concerns about their project delivery are raised.

The purpose of a desk check is to inspect the financial compliance with programme rules and review of supporting evidence, as well as the performance of a project's delivery and outputs.

On-the-spot-check

On-the-spot-checks (OTSCs) are the heightened level of compliance check. There are two different categories, during and after:

- **The second level is the On-the-spot-check during audit** – an on-site visit by the Compliance Team to an organisation during live project activity. This audit is an in-depth audit of the project and the organisation, reviewing their original records and interviewing staff. This audit can be undertaken as a supportive visit to new organisations – to mentor their project management and to ensure their adherence to the programme guidelines. This enables organisations to undertake eligible activity and to increase their eligible budget expenditure (preventing later recoveries).

- **The third level is the On-the-spot-check after audit** – a site visit by the Compliance Team to an organisation after the project closure. This audit is a detailed forensic review of an organisation's records and data, and interviews of staff. This audit is implemented where there are serious irregularities or suspected fraud – resulting from desk check or OTSC during audit findings, from Department for Education (DfE) client notifications, or from allegations of fraud received from third parties. The audit results here are immediately reported to the DfE client, and appropriate actions taken to mitigate risk.

OTSC's will also require evidence of the declarations in Annex 12 of your Grant Agreement (Financial Management and Governance Declaration) to be provided. This includes, but is not restricted to:

- your organisation's finance processes and policies
- insurance
- payment processes, including payments to participants
- data handling

Supporting evidence

You are expected to keep adequate project and financial records to demonstrate that reported or planned activities have, or will, be undertaken in accordance with the approved Grant Agreement. These may be checked as part of any audits undertaken by the Compliance Team.

The minimum requirements for supporting evidence are:

- **Budget categories approved on a unit cost basis** – a declaration, statement or certificate of attendance signed by both the sending or receiving organisation and the participant, stating the name of the participant, the purpose of the activity, and its confirmed start and end date.
- **Budget categories approved on an actual cost basis** – invoices and/or receipts of the related costs incurred, specifying the name and address of the body issuing the invoice and/or receipt, the amount and currency, the date, and in respect of travel, the route taken and date of travel.

We may also request any other documents that we consider relevant, and that form part of the audit trail, to verify costs and activities. This may include estimates or quotes as evidence of justification of the funding requested. If we ask you for any information, explanations, or documents, to establish that the Grant has been used properly, you must provide this to us within two (2) working days of our request. This is as per the Grant Agreement (Clause 8.6).

Project and financial records, invoices and/or receipts should be retained in their original format, whether electronic or hard copy, and all records retained for at least seven years in case of additional audits. This will include records held by subcontractors or consortium members. You are reminded that as per the Grant Agreement (Clause 8.5) you agree to provide us access, as required, to all funded activities sites and relevant records.

Recoveries

A recovery is the recoup by us of unused or ineligible grant funds from you. A recovery can be initiated at any point during the project lifecycle under, but not limited to, the following scenarios:

- if predicted expenditure is not incurred and has been paid to you
- early final report submission due to activities finishing earlier than expected
- termination of Grant Agreement by either you or us
- in cases of liquidation

- once a final report is submitted by you, the activity end date, when full expenditure is reconciled or as a result of further assurance checks

The payment arrangement is aimed at keeping recoveries at a minimum. If a recovery comes due, we will in the first instance seek to recover funding by off-setting (reducing the value to repaid) against the next payment. Where this is not possible, or there is no imminent payment planned, a recovery invoice will be raised requesting immediate payment. You will have 30 days to repay the funds directly and reminder letters will be issued, if you fail to repay the recovery invoice, you will be sent a letter before legal action. Whether a reduction is made on your next payment or via a recovery invoice, it remains your responsibility to make sure that you have sufficient funds available if to deliver all your approved Turing projects.

9. Force majeure

Force majeure relates to cases where something outside of your control prevents you from carrying out planned activity in your project. The clause can be invoked when you are unable to rearrange the planned activity and would incur a financial loss as a result.

We are aware that due to the Covid-19 pandemic, project activity may have to be postponed or cancelled. Project activities arranged before any significant change to UK or other national Covid-19 mitigation, i.e. lockdowns, may be deemed to be a force majeure. In cases of force majeure, project costs, that have been incurred and cannot be recovered, for instance through insurances, may be covered by your Turing Scheme Grant Agreement, subject to our approval.

All cases of force majeure must be approved by us prior to submission of the project's final report.

In instances where you need to claim force majeure, you need to follow the following steps:

1. Notify us in writing of the incident as soon as possible. Explaining:
   a. The nature and extent of the circumstances giving rise to force majeure.
   b. Why the force majeure can't be prevented, i.e. why the activity can't be delayed.
2. Await confirmation from the us that the force majeure has been accepted. This typically takes 30 days to process.

Approved cases of force majeure will see funding honoured, at actual cost, on mobilities despite the mobility not taking place.

10. Impact and dissemination

Impact

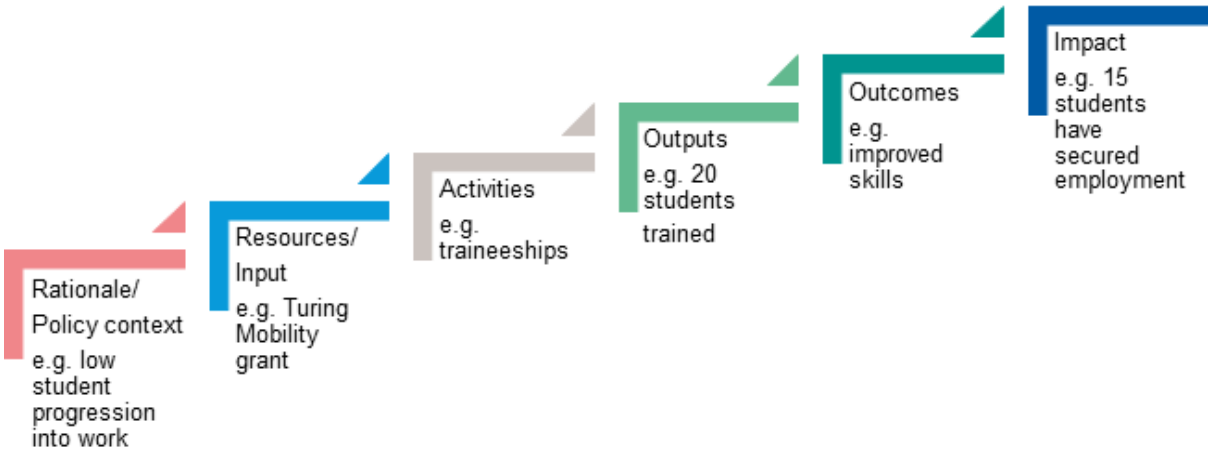
Impact of a project is a key priority in the Turing Scheme, and forms a core component of the assessment criteria, with the key points being whether the project has a substantial impact on participants, and the breadth of the impact. To be considered as best practice and to support high quality within your project, you should place a focus on impact at all levels throughout the project lifecycle.

We anticipate that making an impact is what has driven your organisation to apply for Turing Scheme funding, as you wish to improve education and training practices and provisions in your area, region, and your partner organisations' localities. Impact is a very important area as it is one of the key areas we will use to assess your project at final report stage. As a result, it is imperative that you are clear from the start what impacts you want to achieve within your project and set up relevant mechanisms to measure these impacts.

We will ask for information about your project's impact during monitoring activities (where applicable) and in the final report. Whilst detailed guidance will be provided before you submit your reports, you should understand that the impact on participants and on the participating organisations is one of the key assessment areas of your project.

Creating Impact

The below model demonstrates how you can create impact and provides examples to illustrate each step of the process. This model begins with identifying the rationale for project activities, that is, the needs of your participants and any other relevant stakeholders. This rationale establishes a baseline from which progress can be measured. You should then make sure that all the project activities and results fit well with your rationale.



Measuring impact

Here are some practical suggestions to evaluate the outcomes and impacts of your projects:

- Use an **evaluation form** that participants can complete to evaluate different aspects of the mobility as well as the impact it has had on them. Ask participants to complete forms **at different stages of the project**, so they can better measure the developments and differences. For instance, they can fill in forms before, during and after their mobility, as long as the evaluation form contain the same type of questions in order to allow you to draw comparisons.
- If you have a small number of participants, you could also **interview them** at different stages.
- **Don't just involve your participants**, but also involves others who work with them, e.g. teachers. For example, if you are sending learners abroad you could get their teachers/tutors to complete evaluations of the standard of their work before and after.
- For short mobility periods, give participants **daily diaries**, which ask how the activities undertaken have had an impact on their needs and met the aims they have set for themselves. Be clear with your participants that these diaries are not a private account and that they will be shared. A common format would help with this.
- Explore some **innovative evaluation tools** such as Blobtree. This tool uses a simple cartoon image of non-specific characters and asks you to consider which character you most identify with. It could be suitable if you are trying to elicit views from participants who may not be comfortable expressing themselves verbally.
- Use any **existing KPIs** within your department or organisation and link them to your project.

- Although the immediate impact is likely to be on the participants, do not forget to capture the **full impact** the project has had or will have on other stakeholders and your organisation, as well as on people at all levels of the project including partners and yourself as project manager.

It is important to effectively report on the impact of your project within your project's final report. To prepare for this you should check your application to remind yourself of the project's expected impact, and the methods you planned to use in order to create and capture impact. At the final report stage, you will be expected to report as a minimum on your planned impacts and actions, but feel free to add to your original plans with information such as any unexpected impacts.

You should avoid copying and pasting the information included in the application form into your final report. Your report should contain meaningful detail about what impacts were actually achieved, whether targets were met and, if not, why.

We understand that the timeframe for submitting your final report may not allow you to identify impacts in the medium-term and long-term however you can detail how you intend to evaluate this in the future.

Dissemination

Dissemination is the process of communicating project **results**, **successes**, **outcomes and impacts** as widely as possible. You should aim to implement the dissemination plan outlined in your application form, while continually building on this. An effective plan encompasses why, what, how, when, to whom and where.

Dissemination activities should be considered throughout the project lifecycle, including during and after the funding period, and it should link into your evaluation strategy. Dissemination should consist of both **tangible** outcomes and **intangible** outcomes, such as skills and personal experiences that both project organisers and participants have acquired.

Tangible Results	Intangible Results
An approach or a model to solve a problem	Knowledge and experience gained by participants, learners or staff
A practical tool or product, such as handbooks, curricula, e-learning tools	Increased skills or achievements
Research reports or studies	Improved cultural awareness
Good practice guides or case studies	Better language skills
Evaluation reports	Future employment of learners
Recognition certificates	
Newsletters or information leaflets	

Dissemination is an integral part of all projects and should raise awareness about your project, as well as highlight the outcomes of the project. Participants, sending organisations and receiving organisations should all be involved with dissemination activities. Good practice and lessons learnt should be implemented within participants' own organisations and through wider local, regional, national and/or international networks.

Projects which have good results on a participant level and on a wider scale may be used as case studies and featured on our website and in other media, which is another way of disseminating outcomes and impacts that the project has had on the participants, organisation and wider

community. If possible, it would be beneficial to not only send written information, but also photographic evidence and/or videos of the participants on mobilities.

We encourage you to engage with our social media channels:

- Turing Scheme on Facebook
- Turing Scheme on Twitter
- Turing Scheme on LinkedIn
- Turing Scheme on Instagram

You can tag us using @TuringScheme_UK on Twitter when sharing information about your project and use our hashtag #TuringScheme on all channels. We are keen to retweet and share your project activities. You can also keep up-to-date with the latest information on the Turing Scheme by signing up to our mailing list.