HM Government

TURING

SCHEME

The UK's global programme
to study and work abroad

Turing Scheme Handbook 2023 to 2024

Version 1.0

Funded by
UK Government

SKILLS FOR LIFE

Capita

Contents

This Handbook provides guidance designed for Grant Recipients to help manage their Turing Scheme Project.

The relationship with the Turing Scheme Delivery Partner is governed by the Grant Funding Agreement and what is set out in **Part 1** of this Handbook does not supersede or replace the agreement, and the rights and obligations set out within it.

Part 2 of this Handbook provides a User Guide for the Project Reporting Tool.

Part 1

1. Grant Funding Agreement and Annexes

The Grant Funding Agreement is split into several sections and annexes. Some annexes are shown as NOT USED as the Grant Funding Agreement follows a standard government document format and only the annexes needed for this Grant are populated.

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. You must ensure you are familiar with your points of expenditure and that you make your payment request in time to ensure mobilities are not affected. Processing of payments can take up to 60 days.

ANNEX 2 – FUNDED ACTIVITIES AND PAYMENT SCHEDULE

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 Mobility Group start dates.

As part of your Grant Funding Agreement you agree to keep your contact information and plans up-to-date by submitting a change request.

You can read more about your Project Plan in the 'Payments' section.

ANNEX 3 – NOT USED

ANNEX 4 – NOT USED

ANNEX 5 – NOT USED

ANNEX 6 – NOT USED

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'.

It is really important these details are kept up to date as these are the details we will use to contact you about the Grant Funding Agreement and your Funded Activities.

Many beneficiaries have found that they can simplify communications by email by setting up a shared mailbox to manage Turing Scheme emails.

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 and/or vulnerable adults, then you must complete and sign the safeguarding checklist and return it to us at Turing-Scheme@capita.com before any Mobility Groups travel. For more information, please see the 'Health and Safety' section.

Your funding may be suspended if you fail to complete this Annex prior to any Funded Activities taking place.

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 which is due 28 days after the completion of your final mobility. It will benefit both the delivery of your mobilities and preparation of your final report if you ensure that you are fully familiar with the planned activities.

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, or other Grant Recipients in receipt of Grants of £40,000 or less. This is 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, and where approval is needed.

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

Failure to keep details up-to-date or to follow the change control procedures may result in delays in receiving your funding or funds being withheld.

ANNEX 12 – NOT USED

ANNEX 13 – NOT USED

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). The bank account you wish the Grant to be paid into must be an ordinary business bank account. You are required to attach a PDF copy of your bank details, on the organisation's letterhead, signed by the same authorised person that can sign the Grant Funding Agreement, along with a copy of a bank statement/official document from the bank. You must enter your organisation's bank details into the Project Reporting Tool before your first Payment Request submission deadline.

For the step-by-step process of how to enter bank details, please see Part 2, Section 15 Adding/updating bank details.

The Project Plan, which is created through collation of the information entered by the Grant Recipient into the Grant Application, forms the starting point for the payments to be made to the Grant Recipient by the Delivery Partner.

The Project Plan summarises the Mobility Group start dates, the Anticipated Points of Expenditure, and when requests will need to be submitted for payments to be made. Access to the Project Plan data will be incorporated into the Project Reporting Tool.

The Project Plan will need to be reviewed in the month of the Project's first Mobilities and, as appropriate, updated, monthly, if necessary, through the Project Reporting Tool. You are required to keep your Project Plan up to date over the lifetime of your project via the Project Reporting Tool. This includes Mobility Groups that have started and Mobility Groups that are yet to begin.

Payment Requests

To trigger the payment of funds for your Mobility Groups, you will need to make Payment Requests via the Project Reporting Tool. The Mobility Group 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.

The Grant Recipient is required to submit a Payment Request together with a Declaration via the Project Reporting Tool by the **15th day** of the month, **two months prior** to each Anticipated Point of Expenditure (exceptions to this apply for Payment Requests in August, September and October).

If the Grant Recipient fails to submit a correctly completed Payment Request **and** a Declaration before the deadline, payment **will not** be made.

All Payment Requests need to be supported by the submission of Participant data, to confirm that the Mobility is going ahead. Partial Payment Requests can be submitted if you do not have data available for all Participants. For more information, please see Part 2, Section 13 Payment Requests.

It is the Grant Recipient's responsibility to ensure that the Anticipated Point of Expenditure and associated data remains accurate, reflecting the true value of funding needed. Payments will be made around the beginning of the month of your Anticipated Point of Expenditure, but no later than if60 days after approving the request.

For cost categories which are paid based on actual costs (e.g., exceptionally expensive travel), the Delivery Partner will request evidence from the Grant Recipient to review accuracy and eligibility of the Payment Request. If you are not able to provide this evidence at the time of your Payment Request, you will be asked to provide this by the Delivery Partner later, as per Grant Funding Agreement, paragraph 4.6, within two Working Days of a request of such information.

Making a Payment Request

Full details of the step-by-step Payment Request process can be found in Part 2, Section 13, Payment Requests.

If you are struggling to make a Payment Request, then please contact the Service Centre via turing-scheme@capita.com for advice.

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.

The table below outlines the Payment Request submission deadline for each Anticipated Point of Expenditure:

Anticipated Points of Expenditure	
Month of Anticipated Point of Expenditure	**Payment Request submission deadline**
August 2023	31 July 2023
September 2023	31 August 2023
October 2023	31 August 2023
November 2023	15 September 2023
December 2023	15 October 2023
January 2024	15 November 2023
February 2024	15 December 2023
March 2024	15 January 2024
April 2024	15 February 2024
May 2024	15 March 2024
June 2024	15 April 2024
July 2024	15 May 2024
August 2024	15 June 2024

Mobility Group costs

Mobility Group costs need to be requested per Mobility Group and are paid based on the Point of Expenditure you have selected for the Mobility Group start month as part of your application (as outlined in your Project Plan). There will be no payments before 1 August 2023. When payment is made, you will receive 80% of funds requested, with up to the remaining 20% being paid upon satisfactory receipt of your Final Report and confirmation of expenditure.

Please note:

- For any Anticipated Points of Expenditures, a Payment Request needs to be submitted via the Project Reporting Tool by the **15th day** of the month, **two months prior** to your Anticipated Point of Expenditure. For September and October Points of Expenditure, your Payment Request via the Project Reporting Tool will be due by 31 August.

Organisational Support

Organisational Support payments also need to be requested and are based on the Anticipated Point of Expenditure you have chosen in your Project Plan. There will be no payments before 1 August 2023. Grant Recipients will receive one payment of Organisational Support funding, 80% of which is paid at the Anticipated Point of Expenditure, with the final 20% paid on satisfactory receipt of your Final Report.

Payment Request timelines are the same as for Mobility Groups.

Match Funding

You should tell us about any Match Funding which has been approved or received in relation to any elements of your Turing Scheme Project before your Project starts. If you are looking to apply for, or you are offered or receive any further Match Funding while your Project is underway, you should tell us before accepting or using any such Match Funding.

When you tell us about any Match Funding, you should specify the amount, purpose and source of the Match Funding and we will confirm whether it is acceptable for you to receive the Match Funding.

Please contact us at turing-scheme@capita.com to provide this information.

3. Project and Mobility durations

Project timeframe

Projects can take place between 1 September 2023 and 31 August 2024 for all sectors.

Mobilities taking place in countries or territories with different academic periods or term dates may begin outside the 2023 to 2024 academic year, but the majority of the placement must take place within these dates. Funding will only be provided for the part of the placement within the 2023 to 2024 academic year, and Mobilities will still need to respect the programme's minimum and maximum durations during that window in order to be eligible for funding.

The duration of a placement is calculated to include all days, whether whole or part, in which a Participant is engaged in their placement abroad. For example, if a Participant arrives at their placement on 1 September and departs from their placement on 28 September, their placement is of 28 days duration. It is not a calculation based on nights abroad or the proportion of the day they spend overseas. Any full (24 hour) days spent in transit should not be included in the duration.

If your final Mobility placement ends before **31 August 2024** you should submit a Final Report within one month of that final Mobility placement and close the Project early and receive or return any remaining funding within 30 days or your project maybe become passed to a recovery scenario.

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 a Mobility but meets the minimum duration requirement, you should report this change in the Project Reporting Tool as soon as possible. The Turing Scheme Grant can cover only the actual period spent abroad and any **overpayment must be returned** to the Project, unless specific exemption is given due to Force Majeure.

Please see the 'Recoveries' section for more information on how monies that are not promptly returned will be recouped by our recovery process.

Short durations due to Force Majeure

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 (see Grant Funding Agreement for full definition). 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.

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 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;
- when FCDO travel advice for the host country, or the region within a country, where a placement takes place changes to 'do not travel'.

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, or the 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 request on a case-by-case basis.

If a short duration request is approved, you must amend the Participant list in the Project Reporting Tool 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 returned.

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 Project Reporting Tool and return the full Grant for the Mobility to the Project.

Selection of Participants

You, as the Grant Recipient, 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.

We also recommend highlighting the [Turing Scheme Privacy Notice,](#) which sets out how Participants' personal data will be processed. 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.

Participants cannot be partially funded. This means learners should receive the full rate applicable for the period of their Mobility. Moreover, learners should not face any periods where no Grant is received whilst on a Turing Scheme Mobility. The only exception is if a Participant goes on a Mobility where term dates fall outside the eligible period for funding (1 September 2023 to 31 August 2024). 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.

The funding provided through the Turing Scheme supports Participants to meet a portion of the costs associated with a work or study placement overseas. Since the Turing Scheme relies upon public resources to support Participants, it is essential that funds are distributed and managed in accordance with Managing Public Money guidance.

This means that Participants should not be funded twice for the same expense. Therefore, Participants cannot use Turing Scheme funding to pay for assets (for example, IT equipment) or services (for example, travel) where a Participant is, or expects to be, in receipt of funding provided by another source for the same assets or services. If an expense covered by the Turing Scheme is found to have also been funded by another source, the TSA will seek to recover the Turing Scheme funding.

Participants can 'top up' funding where one source of funding does not meet the full costs of participation in the Mobility. For example, if travel is more expensive than the amount of funding provided by the Turing Scheme, Grant Recipients or Participants may use funding where eligible from another source to cover the additional costs of travel, although this should not exceed the actual, reasonable travel costs.

Similarly, for some cost categories, such as the cost-of-living contribution, Turing Scheme funding paid may not cover all of Participants' living costs. Where that is the case, Grant Recipients or Participants are able to The Turing Scheme Programme Guide 2023 to 2024 14 make up the difference between the amount available to them and their total living costs through funding from other sources. Participants can 'top up' funding where one source of funding does not meet the full costs of participation in the Mobility. For example, if travel is more expensive than the amount of funding provided by the Turing Scheme, Grant Recipients or Participants can use funding from another source to cover the additional costs of travel, although this should not exceed the actual travel costs.

Similarly, for some cost categories, such as the cost-of-living contribution, Turing Scheme funding paid may not cover all of Participants' living costs. Where that is the case, Grant Recipients or Participants are able to make up the difference between the amount available to them and their total living costs through funding from other sources.

4. Budget

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

Organisational Support

Organisational Support will be made available towards the costs directly linked to the administration and implementation of a placement. Under each Project, £315 will be provided per Participant for the first 100 Participants. For the 101st Participant onwards, £180 will be provided per Participant.

You may decide how Organisational Support (OS) is to be used to provide support to the delivery of Turing Scheme Mobilities, but you are required to keep receipts for the purchase of goods and services The Turing Scheme will conduct audits of beneficiaries to ensure that sending organisations are not profiting financially from the organisational support funding.

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

- the cost of administrative support, such as staff salaries and equipment
- promoting the scheme within your institution (such as providing print copies of online materials, hosting events for potential Participants and their parents or guardians etc.)
- the cost of IT such as licences for software, if this is appropriate and required to support the scheme
- supporting linguistic preparation for Participants and preparatory workshops/events 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 efficient mentoring and supervision arrangements for Participants
- ensuring recognition of the educational components and related credits, issuing transcripts of records and diploma supplements
- supporting the reintegration of mobile Participants and building on their acquired new competences for the benefit of the sending organisation and peers.

Travel costs

An amount of funding will be provided to go towards the direct costs of travel for a Mobility. The amount of funding available depends on the distance between the sending and destination provider and is grouped in distance bands shown below.

Please note, the distance measurement is from the sending institution to the receiving institution, but the amount is to support the cost of the round trip.

This will be available to the following Participants:

- HE Participants from disadvantaged backgrounds
- all Participants from the FE/VET sector
- all Participants from the Schools' sector

Funding available by distance:

- 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 following the below steps. Distances must be calculated in straight lines from start to end point:

- right-click on the starting location
- choose 'Measure distance'
- click on the destination to create a path to measure.

Exceptionally expensive travel

The Scheme will also provide financial assistance towards exceptionally expensive travel to all Schools, FE/VET Participants and HE Participants from a disadvantaged background. The 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 70% of the travel costs of Participants. Participants can receive up to 80% of actual costs. Assessors will reduce the expensive travel cost claim if the request is considered too large or a clear justification has not been provided. Applicants must therefore provide a detailed justification and breakdown of their claim.

When requesting funding for exceptionally expensive travel, please include the amount equal to 80% of the actual travel cost, minus the standard travel Grant amount. An example is shown below:

Travel Grant (500 to 1,999km) = £250

Actual travel cost= £500

As the travel Grant does not cover at least 70%, Participants can receive up to 80% of actual travel cost = £400

You can claim exceptionally expensive travel for the Mobility (£400 - £250) = £150. This is in addition to the travel Grant of £250.

Cost of living

An amount of funding will be provided towards the general cost of living for each Participant. This will vary depending on sector and/or destination country/territory.

Destination countries/territories are grouped into three categories:

- Group 1 (high cost of living)
- Group 2 (medium cost of living)
- Group 3 (lower cost of living)

Please note that the full list of destination countries/territories within each group can be found at Annex C of the Programme Guide and is also available on the Turing Scheme website.

Higher Education

HE student placements with a total duration of four to eight weeks will receive:

- £545 per month (equal to £136.25 per week) for Group 1 destinations

- £480 per month (equal to £120 per week) for Group 2 and 3 destinations

HE student placements with a total duration of nine weeks to twelve months will receive:

- £380 per month (for Group 1 destinations)
- £335 per month (for Group 2 and 3 destinations)

Please note that placements lasting nine weeks to twelve months will receive the rates identified for this category for the full duration of the Mobility and not the higher rates for the initial period of eight weeks. Please note: the minimum duration of four weeks for HE is equal to 28 calendar days.

FE/VET

For learners on an FE and VET placement, they will receive:

- to Group 1 destinations: £109 per day for the first 14 days, £76 per day after the 14th day
- to Group 2 destinations: £94 per day for the first 14 days, £66 per day after the 14th day
- to Group 3 destinations: £80 per day for the first 14 days, £56 per day after the 14th day

Schools

Pupils and accompanying staff on a school placement to any destination will receive:

- £53 per day for the first 14 days
- £37 per day from the 15th day onwards

This is calculated based on the duration of the Mobility per Participant (if necessary, including one travel day before the activity and one travel day following the activity).

Additional support for Participants from disadvantaged backgrounds

Exceptional costs

Participants from disadvantaged backgrounds across all sectors will receive funding for exceptional costs. Exceptional costs are calculated on an actual cost basis and are specifically for any necessary additional costs incurred to support the participation of disadvantaged Participants. Funding covers costs such as passports, visas, insurance, as necessary. Please see the Payments section in the Programme Guide for information on how actual costs are evidenced.

Additional cost of living support (Higher Education only)

Participants on an HE placement meeting the disadvantaged background criteria outlined in Annex A of the Programme Guide will receive an additional £110 per month to their cost of living Grant. As such, the total cost of living Grant Funding provided to students from disadvantaged backgrounds will be as follows:

For placements with a total duration of four to eight weeks:

- £655 per month (equal to £163.75 per week) to Group 1 countries or territories
- £590 per month (equal to £147.50 per week) to Group 2 and 3 countries or territories

For placements with a total duration of nine weeks to twelve months:

- £490 per month (equal to £122.50 per week) to Group 1 countries or territories
- £445 per month (equal to £111.25 per week) to Group 2 and 3 countries or territories

Please note that placements lasting nine weeks to twelve months will receive the rates identified for this category for the full duration of the Mobility and not the higher rates for the initial period of eight weeks.

For HE students who do not meet the above criteria for additional support, there may be other Grants available to cover some travel expenses, relevant to the student finance system relevant to the Participant:

- England – [Studying abroad: travel Grants for students (England)](#)
- Scotland – [Guide to undergraduate funding – SAAS](#)
- Wales – [What finance is available for Welsh full-time undergraduate students | Student Finance Wales](#)
- Northern Ireland – [Spending part of your degree course abroad | NI direct](#) and [How much full time undergraduate Travel Grant for NI students can I get? - Student Finance NI](#)
- Participants from British Overseas Territories should check with their government's education department for the details of support available to them.

Linguistic support (FE/VET only)

Linguistic support refers to language preparation for placements over 19 days, undertaken by learners before their placement starts. Linguistic support is provided in the form of a financial Grant to FE/VET Participants (£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/territory, to ensure learners will be ready to live and work in a different environment and in a different country/territory. 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 placement.

Additional support for those with special educational needs (SEN) and/or disabilities

To enable students with special educational needs (SEN) and/or disabilities to access the Turing Scheme, such Participants can have up to 100% of their actual costs met for support that directly relates to their additional needs to participate in the Mobility. Please see the payments section of the [Programme Guide](#) for information on how actual costs are evidenced.

One such example is pre-Mobility visits by the sending organisations: these can be carried out and funded by the Turing Scheme if funding for this is not already available. These can be done to carry out risk assessments and ensure Participants will be able to equally access and take part in all elements of a placement.

Funded 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. Participants should not be in receipt of this funding if they have already received funding for the same purpose from another source.

Please see the [Programme Guide](#) for the detailed Turing Scheme definition of Special educational needs and disabilities.

5. Making changes to your Project

Your Project Plan should be kept up to date at all times. This is why you will be asked when making Payment Requests or submitting a monthly report to confirm whether any changes have occurred.

Failure to keep your data up to date may result in funding being withheld.

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. If you need support to make changes to your project, please contact the Turing Scheme Service Desk by emailing turing-scheme@capita.com.

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 of the Grant Funding Agreement) to turing-scheme@capita.com 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.

It is really important these details are kept up to date as this is the information the Turing Scheme will use to contact you about the Grant Funding Agreement and your Funded Activities.

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. In the first instance, you should email turing-scheme@capita.com to tell us of your plans and seek advice.

Change requests

When making changes to your Project, there are two routes that may apply:

- Changes the Grant Recipient can make to their Project which will be automatically approved
- Changes that require our approval

Any change that would impact a Payment Request must be submitted via the Project Reporting Tool 30 days prior to that Payment Request. The Project Plan in the Project Reporting Tool will automatically reflect the changes.

Changes cannot result in exceeding the overall Grant Funding for the Project that was agreed in this Grant Funding Agreement. Payments will always be made based on the latest Approved Project Plan.

In exceptional circumstances, if you cannot adhere to the 30-day notice period, or if you identify a necessary change to a part of your Project you have already received Grant Funding for, the change must be submitted via the Project Reporting Tool as soon as it is known.

For the purposes of making changes to your Project, your Project budget falls into two categories:

Mobility Group start month – these are considered based on the Mobility Groups that start in the same month, rather than the whole Project and are:

- Learner cost of living support
- Disadvantaged uplift costs
- Learner travel costs
- Participant numbers
- Accompanying person numbers
- Linguistic support budget

Project budget categories – these are considered across all of your Mobility Groups in the whole Project and are:

- Organisational Support costs
- Exceptionally expensive travel
- Exceptional costs
- Additional educational needs support costs

You may consider changes which include both categories. If either category requires approval, then approval needs to be sought for the whole change.

Upon submitting your changes to the system, the system will make you are aware whether the change requires approval.

For full details of the step-by-step change request process, please see Part 2.

Changes possible without our approval

You are permitted to transfer the following Grant between the different **Mobility Group start month budget categories** without seeking our approval under the condition the following rules are respected:

- You are permitted to increase or decrease the number of Participants and accompanying persons (if applicable) up to and including 10% of the original number approved per Mobility Group start month.
- You can increase or decrease learner or accompanying person cost of living support, travel budget, disadvantaged uplift costs and linguistic support budget (if applicable) up to and including 10% of the original value approved per Mobility Group start month.

You are permitted to transfer the following funds between the different **Project budget categories** without seeking Delivery Partner approval under the condition the following rules are respected:

- You cannot increase the Organisational Support budget. Organisational Support is directly linked to the number of Participants with the amount calculated on the basis of the number of Participants within the Project. As such Organisational Support may reduce if the number of total Participants decreases. however, the Grant Recipient can decrease the Organisational Support budget by up to and including 10%.
- You can increase or decrease the following additional cost categories (if applicable) by up to and including 10%:
    - Exceptionally expensive travel
    - Exceptional costs
    - Additional educational needs support costs

We, as the Turing Scheme Delivery Partner, reserve the right to increase or decrease these percentage thresholds if there is an operational or policy reason to do so, requested by the Department for Education.

Changes needing our approval

If you intend to make changes that go beyond the 10% approval threshold of individual budget categories, then approval will need to be sought from us as the Turing Scheme Delivery Partner.

Higher Education

Scenario 1: One Mobility Group with 10 Participants

10 Participants on a four-week Mobility to Hungary (Group 2) = £4,800 Request:

Adding one Participant.

Process: Adding a Participant would cost an extra £480, which is equal to 10% of the Mobility Group start month budget. This change would not need approval.

Scenario 2: Two Mobility Groups with different start months:

Mobility Group starting in January 2024: 10 Participants on a six-week Mobility to Japan (Group 1) = £8,175

Mobility Group starting in September 2023: 10 disadvantaged Participants on a six-week Mobility to Kenya (Group 3) = £8,850

Request: Removing two disadvantaged Participants from the Kenya Mobility Group and adding two disadvantaged Participants to the Japan Mobility Group.

Process: The Participant number for both Mobility Groups is affected by more than 10%. This change would need approval.

FE/VET

Scenario 1: Two Mobility Groups with the same start month:

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 learner cost of living support budget for the Mobility Group start month: £25,110 + £7,116 = £32,226

Request: 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 learner cost of living support Grant for this Mobility Group start month.

Scenario 2: One Mobility Group with 9 Participants:

Nine Participants on a 14-day Mobility to Austria (Group 2) = £11,844 Request:

Add one Participant.

Process: This would cost an additional £1,316 in the learner cost of living support 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 1: Project with 200 total Participants. The Organisational Support budget is £4,950.

Request: Decrease the Organisational Support budget by £400 to go towards exceptionally expensive travel, which has a budget of £5,000.

Process: £400 would decrease the Organisational Support budget by less than 10% and increase the exceptionally expensive travel budget by under 10%, therefore this change would not need our approval.

Scenario 2: One Mobility Group, with an overall learner cost of living support Grant of £74,200 (based on each Participant undertaking a seven-day Mobility).

Request: Increase learner cost of living support for this Mobility Group by £8,000.

Process: This change would need our approval as £8,000 is over 10% of the original learner cost of living support 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 suspension of Grant Funding or termination of the Grant Funding 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 Mobility.

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 Mobility.

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 Participants are covered by medical and travel insurance for the duration of their 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).

An existing EHIC will remain valid until the expiry date on the card. Participants can apply for a new card up to six months before their 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. You can also receive official advice on travel from the UK Government by visiting the Foreign, Commonwealth and Development Office Foreign Travel Advice website at https://www.gov.uk/foreign-travel-advice

Safeguarding

All sending organisations have a responsibility to safeguard and promote the welfare of Participants under the age of 18. It is an organisation's responsibility to ensure it adheres to the Domestic Law, including any relevant statutory and non-statutory safeguarding guidance relating to your sector, and nation, and that under 18-year-olds are safe on any Mobility. Organisations must adhere to relevant internal safeguarding procedures for all Participants, including those over 18, to ensure they are safe on any Mobility.

Organisations must ensure they adhere to the safeguarding requirements of each nation or overseas territory, ensuring compliance with all legislation and statutory guidance relevant at any time to the safeguarding and protection of children and vulnerable adults.

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'.

Individual colleges in the FE sector are expected to maintain safeguarding and welfare policies that are in accordance with the 'Northern Ireland Further Education Colleges Safeguarding, Care and Welfare Policy Framework'.

For Department for the Economy funded vocational education programmes including apprenticeships, the key guidance expected to be followed by training contractors, is the Education Training Inspectorate (ETI) Safeguarding Guidance and Proforma for Further Education and Work Based Learning, which is available from ETI's website if required. They should also ensure that they are fully compliant with the terms of current legislation relating to the safeguarding of children and/or adults who may be at risk.

For Scotland, the key statutory guidance expected to be followed is the Child Protection and Safeguarding Policy.

For overseas territories, we would expect organisations to follow the regulations and guidance applicable in their own territory.

Please refer to your Grant Funding Agreement, or, the Programme Guide for more detail on safeguarding procedures, and areas to address before a Mobility commences.

All participating organisations should have procedures in place for organising off-site educational visits. Organisations wishing to participate in the Turing Scheme must adhere to Annex 8 of the Grant Funding Agreement and 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.

Organisations should be aware that all child protection incidents, allegations, and concerns must be reported to the Delivery Partner immediately, this includes those that do not meet the threshold requiring the safeguarding lead or head teacher to be alerted, details for this can be found in Part 2. This initial communication should not include any confidential information. This will initiate appropriate support from the Delivery Partner and ensure appropriate due diligence is followed regarding risk management procedures.

A safeguarding checklist has been sent to all successful Turing Scheme applicants (Annex 8 of the Grant Funding Agreement). All requirements must be in place before any Funded Mobility takes place. 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.

7. Reporting

Submitting Monthly Reports and a Final Report is an important, core contractual requirement of your Project.

Failure to submit reports **will likely** result in Grant Funding being suspended or terminated and a recovery of your Grant.

Monthly reporting

Monthly reporting is a mandatory requirement and plays a key role in the delivery of your Project. It serves two primary functions: to update us on the progress of Mobilities you have received payment for to date, and to monitor the progress of the Project against the Approved Project Plan, (including being able to tell us about Project Plan changes).

As part of your monthly report, we will ask you to tell us whether the Participant data you have previously submitted is still up to date. If previously submitted Participant data is no longer up to date, you should update it. A step-by-step guide for this can be found under 'Managing your Participants' in Part 2.

This is necessary in order to allow us to see whether the Participant data entered into the Project Reporting Tool is still accurate and whether the Project expenditure is going ahead as anticipated, e.g., allowing us to see if there are any Participant dropouts or changes to receiving organisations. Failure to complete monthly live reporting will trigger a chase process and will lead to future funding being withheld.

As part of your monthly report, we will also ask you to complete a written update, which will allow you to tell us about the implementation and progress of your Project, changes to Mobilities (where significant) as well as your Project Plan. This should be **submitted via the Project Reporting Tool** by the **15th calendar day of each month**.

Full details of the step-by-step Monthly reporting process can be found in Part 2.

Final Reports

The purpose of the Final Report is to provide a final complete picture of Mobilities delivered, expenditure incurred and enable a budget reconciliation. You must submit your Final Report within one month of the completion of the final Mobility.

Failure to provide a Final Report could lead to the initiation of processes to fully recover all funding supplied by the Turing Scheme for your project.

As part of this, you must update the Project Reporting Tool confirming all Funded Activities have been completed, answer qualitative questions on achieving your Project's aims and objectives and that a final payment is required. If this update is not provided, then the final payment will be withheld.

If you fail to update the Participant data, or the data is incomplete, then the final payment will be withheld.

On approval of the Final Report, we will set out the process for submitting a final Payment Request for the remaining eligible funding of up to 20% of the Grant, if applicable. It may also trigger a request for repayment, should you not have spent all allocated funding.

All 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.

All local authorities and Maintained Schools, or other Grant Recipients in receipt of Grants of £40,000 or less, will be required to complete Annex 10 – Statement of Grant Usage.

You must submit the Certificate of Expenditure or a Statement of Grant Usage alongside your Final Report. The monetary sums disclosed in the Certificate of Expenditure or Statement of Grant Usage must match the amounts disclosed in the Final Report. Discrepancies may result in a further audit which will be conducted at the cost of the beneficiary.

Final payment will be withheld if these are not submitted within 28 days of the final completed Mobility Group placement and alongside the Final Report or by the timeframe agreed by us.

Detailed information about the submission process for Final Reporting can be found in Part 2, section 19.

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 Funding 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, and adherence to programme guidelines as set out in the Grant Funding Agreement.
- On-the-spot-check during audits are an on-site visit by the Compliance Team to an organisation **whilst their Project is live.** This audit is a review of the Project and the organisation, reviewing original records, documentation, receipts, and may include 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 original records, documentation, receipts, and may include interviewing staff.

The Compliance Team will check your adherence to the financial and programme management rules by checking relevant records and management practices. The assurance checks will include an audit of 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, costs associated with providing additional support for those with special education needs and/or disabilities (if applicable), exceptional costs (if applicable) and exceptionally expensive travel 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 the Compliance Team.

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 are a more in-depth level of compliance check. There are two different categories, during and after:

- **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 may include interviewing staff. This audit could be undertaken as a supportive visit to new organisations – to mentor their Project management and to ensure their adherence to the programme guidelines.
- **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 may include interviewing staff. This audit is implemented where there are serious irregularities or suspected fraud – resulting from desk check or on the spot check 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.

Assurance check audits will also require evidence of adherence to section 9 of the Grant Funding Agreement relating to financial management and governance. 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 Funding Agreement.

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. In all instances where actual costs are being claimed, all original receipts must be presented to us for verification as part of the Payment Process.

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 five working days of our request. This is as per the Grant Funding 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 Funding 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 you receive Grant Funding for a Funded Activity (or part thereof) which does not go ahead
- early Final Report submission due to Mobilities finishing earlier than Project Plan
- termination of Grant Funding Agreement by either you or us in cases of liquidation and going into administration once a Final Report is submitted by you
- if you do not adhere to Grant Funding Agreement obligations, such as monthly reporting
- if fraud or irregularity is identified by us when full expenditure is reconciled as a result of further Assurance Checks

The way in which payments are made is aimed at keeping recoveries to a minimum. If a recovery becomes necessary, we will, in the first instance, seek to recover funding by off-setting against the next payment, reducing or removing the value to be repaid.

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. If you fail to repay the recovery invoice, you will be sent a letter before legal action. Legal action may then be instigated if you still do not repay funds.

Whether a reduction is made on your next payment or a recovery via a recovery invoice, it remains your responsibility to make sure that you have sufficient funds available to deliver all your approved Turing Scheme 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. You may be able to invoke Force Majeure where you are unable to rearrange the planned activity (having used reasonable endeavours to rearrange or re-plan the activity or to work around the Force Majeure event) and would incur a financial loss as a result.

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 Funding 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:

- Notify us immediately in writing of the incident via turing-scheme@capita.com, explaining:
    - The nature and extent of the circumstances giving rise to Force Majeure
    - Why the Force Majeure can't be prevented, i.e., why the activity can't be delayed
    - The costs that you and/or the Participant have incurred, which cannot be recovered, despite the Mobility no longer going ahead

- 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.
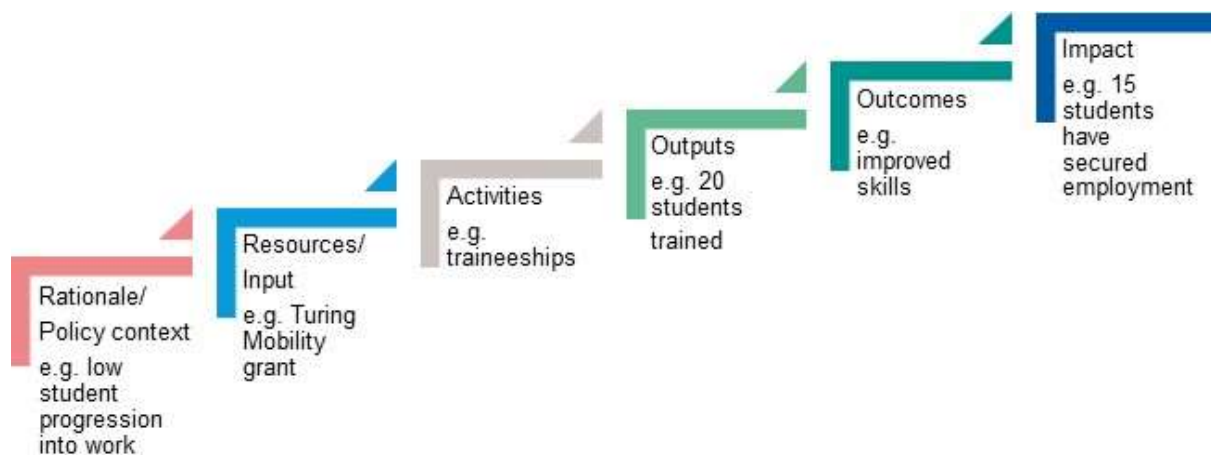
Measuring impact

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 contains 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 involve others who work with them. 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 Blob Tree. 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 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 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 • A practical tool or product, such as handbooks, curricula, e-learning tools • Research reports or studies • Good practice guides or case studies • Evaluation reports • Recognition certificates • Newsletters or information leaflets	• Knowledge and experience gained by Participants, learners or staff • Increased skills or achievements • Improved cultural awareness • Better language skills • Future employment of learners

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 website](#) by signing up to our [newsletter mailing list](#).

Part 2

11. Introduction

The Turing Scheme Project Reporting Tool is where you will manage all aspects of your Turing Scheme Project. It is designed to be a one-stop service, so you can focus on making your Project a success for your organisation and all Mobility Participants.

This section of the Handbook provides you with a practical, technical guide to the Project Reporting Tool. It is arranged in logical sections and broadly mirrors the flow of Part 1.

12. Access to the Project Reporting Tool

You will access the Project Reporting Tool via this link, https://app.ts23.grantis.co.uk/ which will take you to the 'Sign in' page. Insert your email address, password and click the 'Sign in' button to access your Project Reporting Tool (Figure 1). Your 'Sign in' details are the same as at the application stage.

Figure 1 – Sign in page

Having signed in, you will be presented with your Project dashboard (Figure 2). This is divided into two sections: 'In progress' and 'Completed'. The 'In progress' section will detail and act as a reminder for the various tasks that are currently active. The status of each task is also displayed. The 'Completed' section provides the link to your application, its status, and subsequent completed tasks with their associated status.

Figure 2 - Project dashboard

Click through the application link to view your application summary. The overview (Figure 3) provides the important high-level Project detail, where you can access your approved Project budget and the approved Project Plan.

Figure 3 - Application overview

Turing Scheme
Application overview

Application number:
HDJ2123F

Project end:
Tuesday 31 August 2023

Programme guide:
View the Turing Scheme programme guide

Submitted application

View your application

> Click through to view your budget summary

Approved budget and project plan

View your approved budget summary

View your approved project plan

> Click through to view your Project Plan

> Click through to update Participant lists and/or manage change requests

Update participant list and/or project plan

Upload participants list and update mobility groups

Change request: HDJ2123F-CR07112022   **CHANGE REQUEST APPROVED**

Change request: HDJ2123F-CR09122022   **MORE INFORMATION REQUIRED**

Change request: HDJ2123F-CR28122022   **CHANGE REQUEST REJECTED**

Change request: HDJ2123F-CR08012023   **CHANGE REQUEST SUBMITTED**

Change request: HDJ2123F-CR13012023   **CHANGE REQUEST IN PROGRESS**

An example for the HE sector, 'Approved budget summary', is at Figure 4 and the views are the same for the FE/VET and Schools sectors, apart from sector specific differences, such as how duration is calculated.

The approved Project budget has two different views: accumulated and individual. The individual view (Figure 4) depicts an overall view of your Project, whereas the accumulated view (Figure 5) allows you to view the detail of each individual Mobility Group. You can toggle between the two using the 'Change to... 'link.

Figure 4 - Approved budget summary individual view

Approved budget summary

Total approved project cost

£202,390.00

Total mobility groups

8

Current approved project cost (after any changes)
£202,043.10

Current project payment requested
£130,343.50

Click here to toggle between accumulated and individual views

⊙ Show all sections

Change to accumulated view

September 2022

⊙ Hide

Ship building in USA

Category	Current approved number	Current approved budget
Total learner participants cost of living	18	£63,293.00
Disadvantaged learner participants uplift cost of living	6	£1,320.00
Travel costs distance band	12,000km+	£13,600.00
SEND support costs		£1,250.00
Exceptional costs		£4,350.00
Exceptionally expensive travel @ 80%		£1,280.00
Duration (weeks)	16	
USA (Group 2)		
Total mobility group costs		£85,093.00

Figure 5 - Approved budget summary individual view

Total approved project cost

£202,390.00

Total mobility groups

8

Current approved project cost (after any changes)
£202,043.10

Current project payment requested
£130,343.50

⊙ Show all sections

Change to individual view

September 2022

⊙ Hide

Budget

Category	Current approved budget	Current payment requested	Current payment approved	Current budget remaining
Total learner participants cost of living	£57,982.40	£28,976.20	£28,976.20	£28,976.20
Disadvantaged learner participants uplift cost of living	£34,329.00	£17,164.50	£17,164.50	£17,164.50
Travel costs	£9,600.00	£4,800.00	£4,800.00	£4,800.00
SEND support costs	£4,149.60	£4,149.60	£4,149.60	£0.00
Exceptional costs	£12,098.40	£6,049.20	£6,049.20	£6,049.20
Exceptionally expensive travel @ 80%	£4,185.60	£2,092.80	£2,092.80	£2,092.80
Total mobility groups cost	**£122,345.00**	£63,262.30	£63,262.30	£59,082.70

Participants

Category	Current approved	Current requested
Total number of learner participants	28	14
Total number of SEND participants	7	3
Total number of disadvantaged participants	10	5
Total number of participants	**28**	**14**

Mobility group durations

Category	Current approved	Current requested
Total number of learner participant weeks	12	6

By clicking through the 'View your approved project plan' link (Figure 3) you will view your Approved Project Plan (Figure 6). This provides details of your Project start and end dates, Organisational Support, Mobility Groups, and associated payment totals and dates.

Figure 6 – Approved Project Plan

Approved project plan

Project start:
1 September 2022

Project end:
31 August 2023

Type	Month payment request to be made	Organisation to be paid in	Current approved budget
Organisational support	09/2022	11/2022	£31,000.00

Mobility groups

Mobility group start month	Number of mobility groups	Month payment request to be made	Organisation to be paid in	Current approved budget
October 2022	3	07/2022	08/2022	£22,940.00
November 2022	2	08/2022	10/2022	£17,240.00
Total mobility groups cost				**£40,180.00**

13. Payment Requests

IMPORTANT

Before you commence making a Payment Request, make sure your Participant list is added and up to date. To add or update a Participant list, click the 'Upload participants list and update mobilities groups' link on your dashboard as highlighted in Figure 3. As approval can take up to five working days, you will need to ensure that you submit changes to Mobility Groups and/or Participant data in advance of each Payment Request deadline.

Please note that you cannot make a Payment Request if you have a change request already in draft or awaiting approval.

To initiate a Payment Request click through the 'Make a payment request' link on your dashboard (Figure 2). This takes you to the Payment Request overview screen (Figure 7). Click on the 'Request a payment' link and if necessary, upload any associated evidence (detailed in Section 14. Payment Request Evidence Upload Process).

Figure 7 – Payment Request overview

The first question you are asked before updating your Participant list is: 'Do you need to make changes to your project plan?' (Figure 8). This is to ensure we have an accurate picture of the Mobilities planned.

If the answer is 'Yes', this will direct you to a view (Figure 10) that will inform you to return to your dashboard to follow the Change management process. Please note, any changes may need approval before the change can be applied. If your selection is 'No', then you will proceed to request your payment.

You may save your Payment Request as a draft during the preparation process using the link shown in Figure 8. When you return to your dashboard, you will see that the Payment Request status has changed to 'Payment Request Draft' (Figure 9). To return, click on the link to carry on where you left off.

Figure 8 – Enquiring on Project Plan change requirement

Figure 9 – Payment Request overview changed status

Payment requests overview

Application number:
HDJ2123F

Project end:
31 August 2023

Programme guide:
View the Turing Scheme programme guide

Handbook:
View the Turing Scheme handbook

Payment requests

Answer the questions to complete your payment request. If you need to make a change to your project plan, you must do this in the application overview before requesting your payment.

If you need to update your bank details, you can do this in your profile. It can take up to 5 working days for updated details to be approved.

Request a payment

Payment request: HDJ2123F-PR24082022	PAYMENT REQUEST APPROVED
Payment request: HDJ2123F-PR19092022	MORE INFORMATION REQUIRED
Payment request: HDJ2123F-PR21102022	PAYMENT REQUEST REJECTED
Payment request: HDJ2123F-PR23112022	PAYMENT REQUEST SUBMITTED
Payment request: HDJ2123F-PR19122022	PAYMENT REQUEST DRAFT

Click here to return to your change request

Upload evidence

You need to provide evidence of actual costs. You cannot upload supporting documents unless you've submitted at least one payment request.

Upload supporting documents

Figure 10 – Changes to Project Plan

You need to make changes to your project plan before requesting payment

Return to the application overview to make changes to your project plan. These changes need to be approved before you can request this payment.

You must also update your participants list in the application overview if it is not up to date.

If you select 'Yes' in Figure 8, then you are now required to click here to return to the application overview to make the required changes

Return to application overview

On clicking 'No' in Figure 8, you will be directed to a page to select which payment you are ready to receive expenditure for (Figure 11). If you have yet to request Organisational Support, this will

display, and you can select this payment. If you have already requested Organisational Support, then this option will not feature (Figure 12).

Please note, you must submit Participant details for at least one Mobility Group before being able to request Organisational Support.

Figure 11 - Selecting a Point of Expenditure

Figure 12 - Points of Expenditure view with Organisational Support already requested

Select which point of expenditure you are ready to receive payment for

Your point of expenditure is the month you asked to receive payment for your mobility group.

You'll be able request a partial payment if you need to. If so, you'll still have the option to request any remaining payments for that month in your future payment requests.

○ April mobility groups point of expenditure

○ May mobility groups point of expenditure

○ June mobility groups point of expenditure

[Save and continue]

Please note that the Project Reporting Tool will generate an error message if a month is selected that does not have any Participants in the associated Mobility Group, and you should make updates accordingly.

You have the option to request either a full or partial payment, as explained in Part 1, and you are required to select either option (Figure 13). A full payment means your Participant list for the Mobility Group is complete and you are not looking to request further payments for that Mobility Group in the future. A partial payment means you are likely to add further Participant information for this Mobility Group in the future and wish to claim at that point.

Figure 13 – Full or partial payment option

Are you requesting the full payment for your selected points of expenditure?

We will use the participant list to calculate your payment. You need to choose whether you would like to receive a full or partial payment.

A full payment means your participant list for your mobility group is complete, and you are not looking to request further payments for that mobility group in future.

A partial payment means you are likely to add further participant information for this mobility group in the future and wish to claim at that point.

The earliest you will be paid is the month that you selected as your point of expenditure. However, if you are requesting a partial payment you will receive the payment when you request for your remaining participants.

○ Yes, I want to receive the full payment

○ No, I only want to receive a partial payment

[Save and continue]

If you select a partial payment, then you will be required to download and update your Participant list, showing who you are requesting payment for. To do this, follow the screen through as shown in Figures 14-16.

Figure 14 – Partial payment download Participant list

Download and select participants for payment

Download your participants list and select which participants you are ready to receive payment for. You will need to upload this file on the next page.

You will only be paid against the participant data provided. You will be able to update your participants list whenever necessary.

Selecting your participants for payment

Enter either 'Yes' or 'No' in column A to let us know which participants you are requesting payment for. You can only request payment for participants with all their information entered on the spreadsheet.

The rest of the participant information is locked at this stage. If anything is not accurate you need to make changes to your project plan before continuing.

Participants list

Download participants list

> Click here to download your current Participant list. Then click continue.

Continue

Figure 14.1 – Participant list download example

	A	B	C
1	**TURING SCHEME**	**Partial Payment Request**	
2	**Instructions:** • To submit a partial payment request, please select which participants you are ready to receive payment for in the "Request for payment?" column.		**Please note:** • This spreadsheet contains the participants you have most recently uploade fully completed. • Participants which have not been fully completed are NOT displayed for reference only and cannot be changed here.
3	Application ref	Organisation Name	Funding Stream
4	APP-12345	Example University	Further education and vocational education and training
5	APP-12345	Example University	Further education and vocational education and training
6	APP-12345	Example University	Further education and vocational education and training
7			
8			
9			
10			

Note:

Instructions for completion of the partial payment spreadsheet are presented in the spreadsheet.

The spreadsheet will be pre-populated with the Participants that have been most recently uploaded for the selected Point of Expenditure month. Before submitting any Payment Request, ensure that any changes to your Mobility Groups or Participant details are made by submitting a change request and are approved.

Figure 15 – Partial payment upload amended Participant list
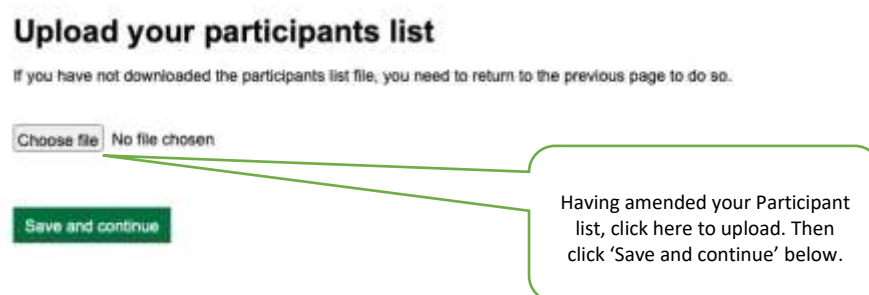
Figure 16 – Partial payment amended Participant list upload complete
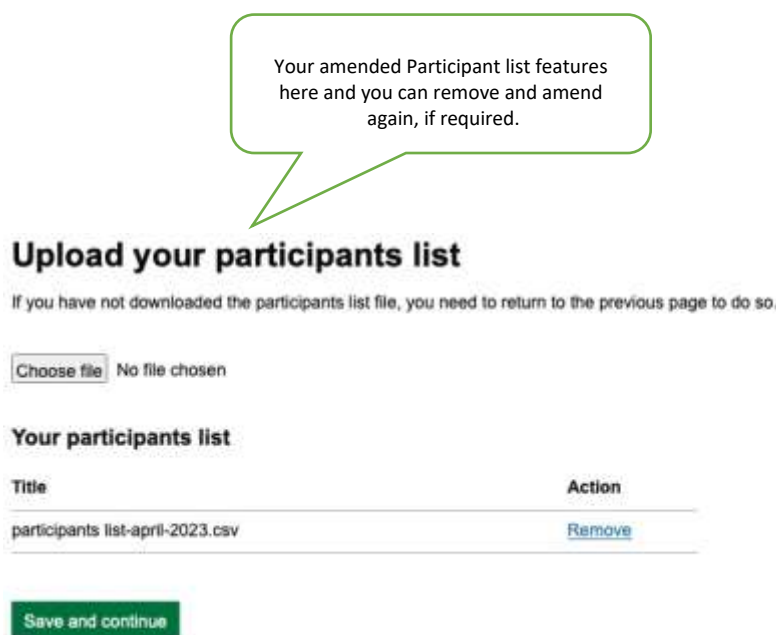
Having uploaded an amended Participant list for a partial payment or having selected a full payment, you are now required to make a Payment Request declaration. Here you are confirming that the claim is for Turing Scheme purposes and is in accordance with the terms and conditions of the Grant Funding Agreement and that you have read and shared, or will share, the Turing Scheme privacy notice with all pupils/learners/students from your organisation who are participating in the Turing Scheme. This is completed by checking the 'I agree' check box shown in Figure 17.

Figure 17 - Payment Request declaration

Payment request declaration

I confirm that:

- the above claim is made in accordance with the terms and conditions of the grant funding agreement for the Turing Scheme

- the grant received and spent has been used wholly for the purpose for which it was given

- the information I have provided in this form represents expenditure incurred or to be incurred for the purposes for which grant is given

- supporting evidence of actual costs being claimed will be provided within 2 working days, if you receive a request from the delivery partner

- that I have shared or will share the Turing Scheme privacy notice with all the pupils/learners/students from my organisation who are participating in the Turing Scheme

☐ I agree

Check this box to proceed

Save and continue

Prior to the submission of your Payment Request, you will be asked to check your answers. Here you will be presented with a summary screen of all aspects of the Payment Request process: Partial payment (Figure 18), Full payment (Figure 19). You may change your response against any entry.

Please note that if you submitted a partial Payment Request, then your Participant List will show and you should make a final check of this. A Participant list is not included in the full payment summary. Once you are content that all details are correct, click 'Submit'.

Figure 18 - Partial payment summary

Check your answers

Point of expenditure you are ready to receive payment for

Selected point of expenditure	April mobility groups point of expenditure	Change
Are you requesting the full payment for your selected point of expenditure?	No, I only want to receive a partial payment	Change

Participant list for a partial payment

Upload your participants list

Your participants list	participants list-april-2023.csv	Change

Payment request declaration

Payment request declaration	I agree	Change

Submit

If everything is correct, click Submit

Figure 19 – Full payment summary

Check your answers

Point of expenditure you are ready to receive payment for

Selected points of expenditure	June mobility groups point of expenditure	Change
Are you requesting the full payment for your selected point of expenditure?	Yes, I want to receive the full payment	Change

Payment request declaration

Payment request declaration	I agree	Change

Submit

If everything is correct, click Submit

On submitting your Payment Request, you will receive a confirmation screen with your reference number (Figure 20). In addition, you will also immediately receive an email confirming the submission and the Payment Request will feature as 'In progress' in your main dashboard (Figure 21). You may also view your request by clicking on the 'View request' link (Figure 22).

Figure 20 – Payment request confirmation
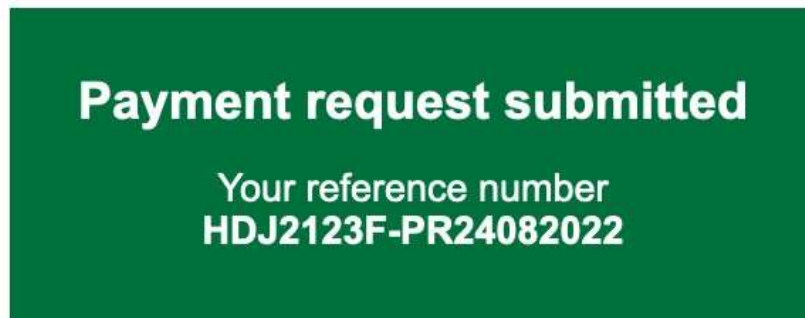
Figure 21 – Payment request dashboard view
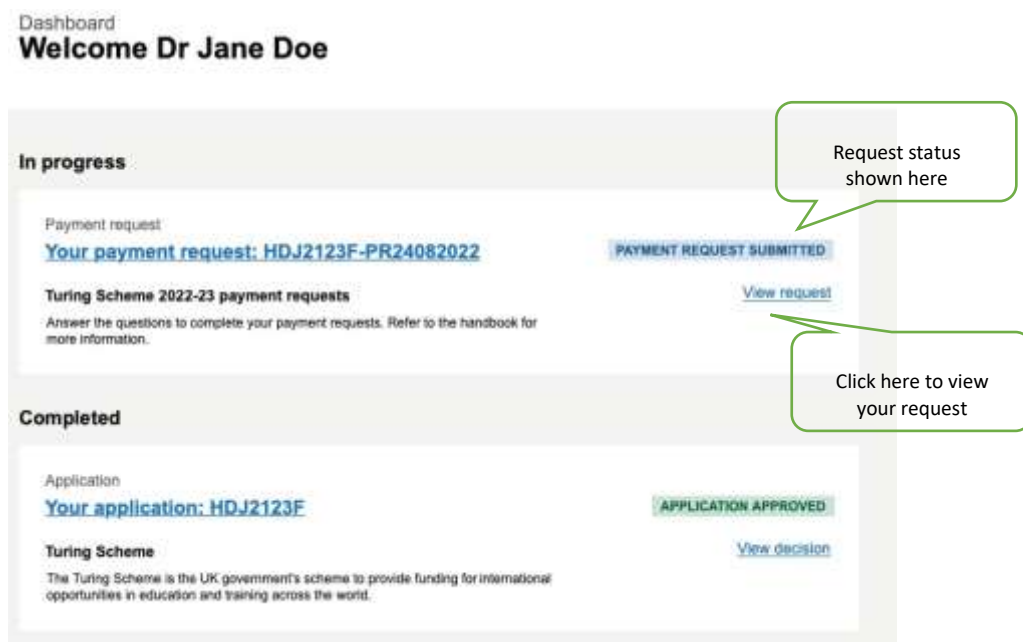
Figure 22 - Populated payment request overview

Payment request:
HDJ2123F-PR19092022

Application number:
HDJ2123F

Payment request submitted:
19 January 2023

Handbook:
View the Turing Scheme handbook

Point of expenditure you are ready to receive payment for

Selected point of expenditure	April mobility groups point of expenditure
Are you requesting the full payment for your selected point of expenditure?	No, I only want to receive a partial payment

Upload your participants list

Your participants list	participants list-april-2023.csv

Payment request declaration

Payment request declaration	I agree

Payment Requests will be collated, and you will be informed of the outcome, which will be via a change in status of the relevant Payment Request in your dashboard and Payment Request Overview (Figure 23).

Figure 23 - Notification of Payment Requests

Application number:
HDJ2123F

Project end:
31 August 2023

Handbook:
View the Turing Scheme handbook

Payment requests

Answer the questions to complete your payment request. If you need to make a change to your project plan, you must do this in the application overview before requesting your payment.

> If you need to update your bank details, you can do this in your profile. It can take up to 5 working days for updated details to be approved.

Request a payment

Payment request: HDJ2123F-PR24082022	PAYMENT REQUEST APPROVED
Payment request: HDJ2123F-PR19092022	PAYMENT REQUEST APPROVED
Payment request: HDJ2123F-PR21102022	PAYMENT REQUEST APPROVED
Payment request: HDJ2123F-PR23112022	PAYMENT REQUEST APPROVED
Payment request: HDJ2123F-PR19122022	PAYMENT REQUEST SUBMITTED

The payment decision is clearly displayed. An example of an approved decision is at Figure 24 and an example of a declined decision is at Figure 25. The latter will include the reason and a facility to appeal.

Figure 24 - Approved Payment Request

Payment request:
HDJ2123F-PR19092022

Application number:
HDJ2123F

Payment request submitted:
19 January 2023

Handbook:
View the Turing Scheme handbook

Payment request decision outcome

Payment request decision   Approved

Point of expenditure you are ready to receive payment for

Selected point of expenditure	April mobility groups point of expenditure
Are you requesting the full payment for your selected point of expenditure?	No, I only want to receive a partial payment

Upload your participants list

Your participants list	participants list-april-2023.csv

This is an approved payment for a partial payment request for the specified Participants

Payment request declaration

Payment request declaration   I agree

Figure 25 - Declined Payment Request

Payment request: PR-VCBFDJ

Application number:
APP-5XWBXG

Payment request submitted:
Wednesday 12 April 2023 12:39pm

Programme guide:
View the Turing Scheme programme guide

Handbook:
View the Turing Scheme handbook

Payment request decision outcome

Payment request decision	Rejected

Point of expenditure you are ready to receive payment for

Selected point of expenditure	Organisational support point of expenditure

Payment request declaration

Payment request declaration	I agree

14. Payment Request Evidence Upload Process

To support your Payment Requests, you are required to upload the relevant supporting evidence of actual costs for cost categories that are paid on an actual cost basis (Part 1, Section 4. Budget). This is performed using a standard file upload procedure as shown below.

Please note, if you are not able to provide this evidence at the same time as you make your Payment Request, you will be asked to provide this later.

To initiate an upload, click the 'Upload supporting documents' link (Figure 26).

Figure 26 - Upload evidence 1

Click 'Choose file' to browse your computer and select the appropriate files (Figure 27). Please use the following file naming convention:

Participant Institution *Participants for*-POEmonth

Figure 27 – Select files function

Upload supporting documents for your payment request

You will need to provide evidence of your actual costs for:

- exceptionally expensive travel
- exceptional cost
- additional support for those with SEND

You must include your participant IDs in your file name, for example, 'PC1234567_Leg_room_upgrade'. You can find your participant IDs by downloading your participants list.

You can upload more evidence at any point.

You can upload PDF, JPEG and PNG file types up to a maximum file size of 5MB.

Choose file No file chosen

Submit   Cancel

Once you have selected your payment evidence files, they will be listed, and you have the opportunity to remove them if you require (Figure 28). Please note the requirement for providing accurate and descriptive file names so the evidence can be clearly tracked. Once you are happy that all documents are listed, press 'Submit'.

Figure 28 - Upload supporting documents

Upload supporting documents for your payment request

You will need to provide evidence of your actual costs for:

- exceptionally expensive travel
- exceptional cost
- additional support for those with SEND

You must include your participant IDs in your file name, for example, 'PC1234567_Leg_room_upgrade'. You can find your participant IDs by downloading your participants list.

You can upload more evidence at any point.

You can upload PDF, JPEG and PNG file types up to a maximum file size of 5MB.

Choose file | No file chosen

Your supporting documents

Title	Action
PC123456-receipt1.pdf	Remove
PC123456-receipt2.pdf	Remove
PC309230-receipt3.pdf	Remove
PC309230-receipt4.pdf	Remove
PC303221-receipt5.pdf	Remove
PC303934-receipt6.pdf	Remove
PC039432-receipt7.pdf	Remove

Submit   Cancel

The final screen is a confirmation message that your Payment Request evidence has been successfully submitted (Figure 29).

Figure 29 - Confirmation of successful submission of Payment Request evidence

Payment request evidence submitted
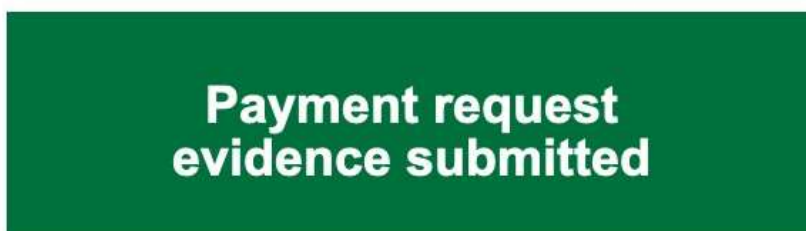
What happens next

We'll contact you if we need any more information about the documents you have submitted.

Return to dashboard

15. Adding/updating bank details

To receive payments, you are required to enter your organisation's bank details that you would like payments to be made to. This is done in the Profile section of the Project Reporting Tool.

Payment details are presented in your Profile account as shown in Figure 30. The status tag will indicate whether they are required, awaiting approval or approved. If they are required or you need to update them, click on the 'Bank account details' link to continue.

Figure 30 – Profile payment details

Once you have clicked through 'Bank account details', complete your organisation's appropriate bank details (Figure 31) and upload the following supporting documents.

- A PDF copy of your bank details, signed by the same authorised person who can sign the Grant Agreement.
- A copy of a bank statement/official document from the bank.

After uploading, they will be listed in 'Your supporting documents' (Figure 32).

Figure 31 - Completion of bank account details

Bank account details

This is the company account where your institution will receive payments.

Name on the account

This is your organisation name, not the name of an individual

Sort code

Must be 6 digits long

Account number

Must be between 6 and 8 digits long

Building society roll number (if you have one)

You can find it on your card, statement or passbook

Bank or building society name

Upload supporting documents for your bank account details update

For example, a bank statement. You can upload PDF, JPEG and PNG file types up to a maximum file size of 5MB

Choose file | No file chosen

Click here to upload supporting documents

Submit   Cancel

Figure 32 - Bank account details with supporting documents listed

Upload supporting documents for your bank account details update

For example, a bank statement. You can upload PDF, JPEG and PNG file types up to a maximum file size of 5MB

Choose file   No file chosen

Supporting documents listed and they may be removed if required

Your supporting documents

Title	Action
Bankstatement_April2022.pdf	Remove

Submit   Cancel

Once you have checked and are content that all details are correct, press 'Submit'. You will then be presented with a confirmation message (Figure 33) and the bank details status in your profile will change to 'Awaiting Approval' (Figure 34). Note that you cannot update your bank details whilst 'Awaiting Approval'. If you attempt to do so, you are presented with the message at Figure 35.

Figure 33 – Confirmation that bank details have been submitted

Updated bank details submitted

What happens next

We'll email you to let you know if your bank details have been approved or not. This can take up to 5 working days.

You cannot make a payment request until your bank details are approved.

Return to profile

Figure 34 – Profile bank details awaiting approval

Profile

Status of bank details

Payment details

Bank account

Bank account details   AWAITING APPROVAL

Figure 35 - Cannot update bank details message

You cannot update your bank details because they are currently awaiting approval

You'll be able to update your bank details once your recent update has been reviewed.

Return to the your profile

Click here to return to your profile

16. Change requests and managing Participant data

The Project Reporting Tool provides a process for inputting and requesting changes to your Project Plan, including your Mobility Groups, and to provide us with Participant data to support your Payment Requests. Over the course of your Turing Scheme Project, you will need to keep your Participant list and Mobility Groups updated.
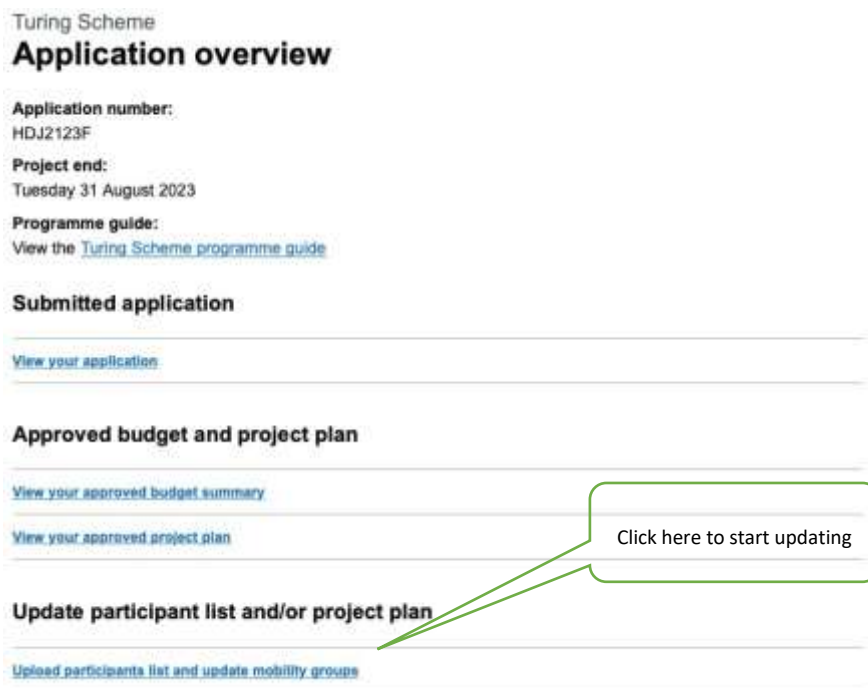
As soon as your changes/updates are known, please submit them straight away, as approval can take up to five working days. You will need to ensure that you submit changes to Mobility Groups and/or Participant data in advance of each Payment Request deadline.

To do this, from your dashboard window (Figure 2) navigate to the 'Update participant list and/or Project plan' section and click Figure 36.

You will receive immediate notification of successful submission, which will be pending approval by the Delivery Partner.

Please note that you cannot make a further change request if you have a change request already in draft or awaiting approval.

Figure 36 - Application overview

You will be asked what part of your Mobility Group you wish to change, either adding or updating a Participant list or updating both Mobility Groups and Participant lists (Figure 37).

Figure 37 – Selecting your update requirements

Add or update Participant list

By selecting 'Add or update participants list', you will follow a sequence to download the Excel file template, complete this with the up-to-date details and then upload into your Project Reporting Tool. This sequence is at Figures 38-40.

38.1 – Download the Participant list template
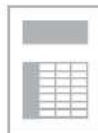
Figure 38.2 - Participant management spreadsheet

Instructions for completion are contained within the spreadsheet. For each Participant entered, you should complete all relevant data fields.

Figure 39 – Select and upload your Participant list file

Figure 40 - Completed the upload

After you have updated your Participant list, you will be asked to check your answers (Figure 49). Please do this carefully and thoroughly, as after this stage you will not be able to change your responses beyond this point without resubmitting your Participant list. You will see the latest version of your Participant list at the bottom of the page. If everything is correct, then click 'Submit'

and you will receive an on-screen confirmation message (Figure 50) and an immediate email (Figure 51).

Please note, Participant list uploads may take up to 20 minutes to reflect on the Project Reporting Tool.

Update both Mobility Groups and Participants list

If you select the option to update both your Mobility Groups and Participant list (Figure 37), you will be directed to your Mobility Group overview (Figure 41) where you can select the Mobility Group you wish to update.

Figure 41 – Mobility Groups overview

From here, you will be taken to the individual Mobility Group summary (Figure 42) and to make changes, scroll to the bottom of the page and click the 'Make changes' button (Figure 42.1).

Figure 42 – Approved Mobility Group details

Figure 42.1 – Approved Mobility Group change function

You are now in the 'Change and review' view (Figure 43). To change a field, click on the relevant 'Change' link. Each field has its unique update page. The example at Figure 44 is for updating the Mobility Group type details. Once completed, click 'Save and return' and you will be taken back to the 'Change and review' page (Figure 43). If you have not completed all aspects of the update, you will then be presented with a conditional error message, prompting you to complete the required sections (Figure 45).

Once you are satisfied that you have updated all aspects of your Mobility Group, press the 'Save and continue' button which can be found by scrolling to the end of the 'Change and review' page (Figure 43).

Figure 43 - Updating a Mobility field

Figure 44 - Provide details of your Mobility Group

Provide details of your mobility group

What type of mobility group is it?

○ Learner mobility traineeship

○ Learner mobility study

How many learners are participating in your mobility group?

Total learner participants
This includes all learners who are participating in your mobility group.

[ ]

Disadvantaged learner participants
This is a sub-group of your learner participants. Read the programme guide for further information on how we define participants as coming from a disadvantaged background.

[ ]

Learner participants with special educational needs and disabilities (SEND)
This is a sub-group of your learner participants. A learner participant could be both disadvantaged and with SEND.

[ ]

How many weeks will your mobility group last?

Duration (weeks)

[ ]

Which country will your mobility group take place in?

Country

[Select a country... ▾]

> On completion click here to return to the Change and review page (Figure 43)

[Save and return] Cancel changes

Once you are satisfied that you have updated all aspects of your Mobility Group, press 'Save and continue' on the 'Change and review' page.

Figure 45 – Conditional error message

You need to complete the following sections before continuing

Estimated costs to support learners with SEND
Details of your costs to support learners with SEND

Once all is correct, you will return to your Mobility Groups overview page (Figure 41), and you are now required to mark this as complete before you can move on (Figure 46).

Note that once you have marked as complete, you won't be able to change Mobility Groups further as part of this change request. If you wish to cancel the changes, then click the 'Cancel all changes' link.

Figure 46 – Mobility Groups overview

The Project Reporting Tool conducts a system check based upon whether your request impacts upon the Point of Expenditure. If your anticipated Point of Expenditure is a new start month with no previous expenditure points, then you will be presented with a request to identify when you wish to receive your funds (Figure 47).

Figure 47 - Identifying anticipated Point of Expenditure

What is your anticipated point of expenditure for October?

This is how long before your mobility groups start in October that you will need to receive the payment.

◯ 1 month before the start month

◯ 2 months before the start month

[Save and continue]

Save and return to mobility groups overview

Alternatively, if you have moved the Mobility Group start month to an existing Point of Expenditure with another Mobility Group, then you will be presented with a summary screen of your revised changes (Figure 48).

Figure 48 – Notification that your Anticipated Points of Expenditure have changed

Your anticipated points of expenditure have changed

This is because you have moved the start month of one or more mobility groups and the anticipated point of expenditure has been aligned with the mobility group(s) already starting in that month. Your anticipated point of expenditure is when you will need to receive the payment for a mobility group.

Traineeship in Korea

New start month	March 2023
Anticipated point of expenditure	January 2023

Ship building in Denmark

New start month	April 2023
Anticipated point of expenditure	March 2023

[Continue]
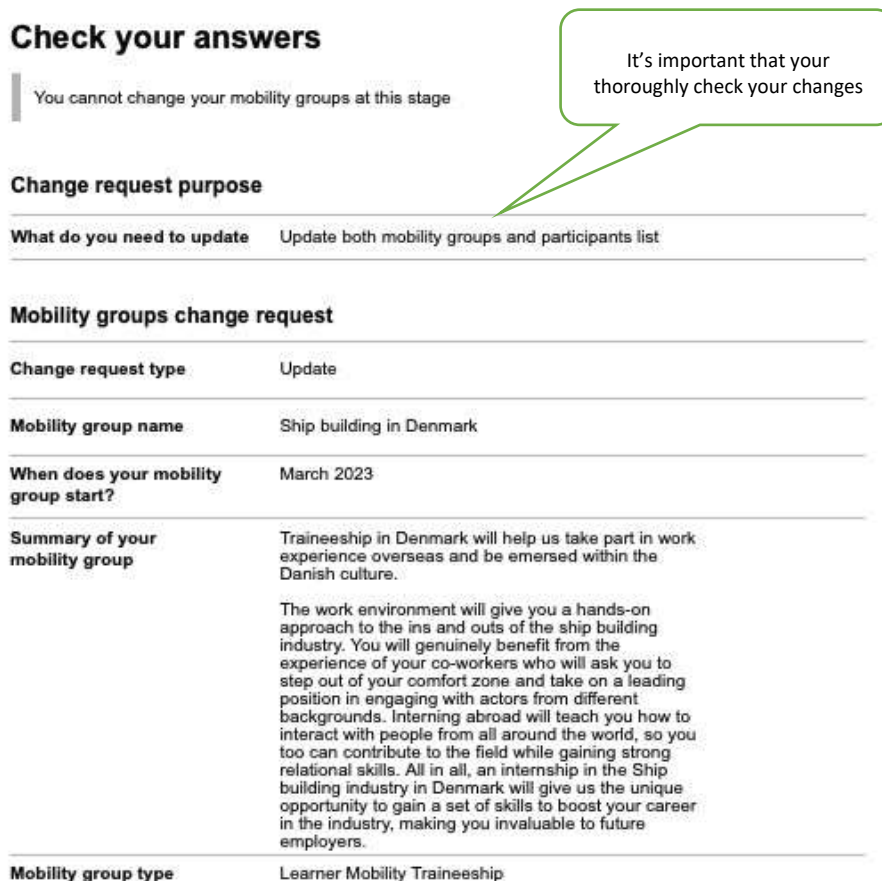
On either of the above options (Figures 47 and 48), or if the start month is the same as before, you will then be asked to update your Participant list in accordance with the sequence in Figures 38-40.

After you have updated your Participant list, you will be asked to check your answers (Figure 49). Please do this carefully and thoroughly, as after this stage you will not be able to change your responses beyond this point. If everything is correct, then click 'Submit' at the end of the page.

Please note:

1. If you wish to cancel your changes you can do so by clicking the link 'Cancel all changes' which will take you to a prompt page (Figure 49) to confirm your action.
2. You can re-upload your Participant list if you spot an error later, anytime up until the Payment Request deadline of the month. If you update it after the deadline, the payment will be made a month later.

Figure 49 – Check your answers

On submission, you will receive a confirmation that your change request has been submitted (Figure 50).

Figure 50 - Change request submitted

Change request submitted

Your reference number
HDJ2123F-CR15012023

We've sent you a confirmation email.

What happens next

We'll let you know if your changes have been approved or not, or if we have any questions.

If your changes are approved, your budget summary and project plan will be updated.

You can request further information by contacting us if you wish to.

Return to dashboard

While your change request is pending review and approval, you will not be able to make any further changes until this process has concluded. Therefore, it is important to be thorough when you are making changes to any Mobility Group.

You will be able to view your change request and its status in the application overview (Figure 51). To view the detail of your change request, click through the highlighted link.

If you attempt to make further changes you will be presented with a message preventing you from doing so until the submitted change request is complete, either approved or rejected (Figure 52).

Please note, Mobility Group updates that are approved automatically may take up to 20 minutes to reflect on the Project Reporting Tool.

Figure 51 - Application overview showing submitted change request

Figure 52 – Cannot update Mobility information message

You will be informed of the outcome of your change request. An example of an approved decision is at Figure 53 and a rejected example (with reason) is at Figure 54.

Figure 53 - Change request decision approved

Figure 54 – Change request decision declined

Adding a Mobility Group

The Project Reporting Tool allows you to add another Mobility Group to your project. To get started, from your dashboard (Figure 2) open your application view (Figure 3) and click the 'Update project plan' link. Then you will be asked 'What part of your mobility do you wish to change?' and here, select 'Update both mobility group and participant list' (Figure 37) and from the 'Mobility Groups overview' page, click 'Add mobility group' (Figure 55).

Figure 55 – Mobility Groups Overview

Firstly, name your Mobility Group with a meaningful and appropriate name (Figure 56). Click 'Save and continue'.

Figure 56 – Name your Mobility Group

Then input the month and year of the Mobility Group start date (Figure 57). Click 'Save and continue'.

Figure 57 - Input the start month of your Mobility

When does your mobility group start?

For example, 3 2023

Month   Year

Save and continue

Now, provide a short summary of your Mobility. You have 200 words, and it must include the Mobility aims, objectives and what the Participants will do (Figure 46). Click 'Save and continue'.

Figure 58 – Provide a summary of your Mobility Group

Provide a summary of your mobility group

Describe:

- what participants will do as part of the mobility
- the mobility aims and objectives

You have 200 words remaining

Save and continue

You are now required to provide details of your Mobility Group including type of Mobility, number of learner Participants (by breakdown if appropriate), its duration and destination (Figure 59). Click 'Save and continue'.

Note: If you wish to pause completion of these details, then scroll to the bottom of the web page and click 'Save and return to Mobility Group overview' and then you can complete your update when ready.

Figure 59 - Provide details of your Mobility Group

Provide details of your mobility group

What type of mobility group is it?

○ Learner mobility traineeship

○ Learner mobility study

How many learners are participating in your mobility group?

Total learner participants
This includes all learners who are participating in your mobility group.

[ ]

Disadvantaged learner participants
This is a sub-group of your learner participants. Read the programme guide for further information on how we define participants as coming from a disadvantaged background.

[ ]

Learner participants with special educational needs and disabilities (SEND)
This is a sub-group of your learner participants. A learner participant could be both disadvantaged and with SEND.

[ ]

How many weeks will your mobility group last?

Duration (weeks)

[ ]

Which country will your mobility group take place in?

Country

Select a country... ∨

Save and continue

If your new Mobility has travel costs, then click 'Yes' in Figure 60, then 'Save and continue' to input the distance between your starting point and your location (Figure 61).

Figure 60 – Confirmation of travel costs

Does your mobility group have travel costs?
Read Annex F in the programme guide for eligibility criteria.

○ Yes

○ No

Save and continue

Figure 61 - Completing travel distance band

What is the distance between your starting location and destination?

This should be the outbound straight-line distance between your starting location and destination.

○ 10 to 99km

○ 100 to 499km

○ 500 to 1,999km

○ 2,000 to 2,999km

○ 3,000 to 3,999km

○ 4,000 to 7,999km

○ 8,000 to 12,000km

○ Over 12,000km

▶ How to calculate the distance

> Click this link for instructions on how to calculate distance to select the correct travel band

By selecting 'No' in Figure 60, or after completing your travel distance band, you will be directed to indicate if there are any additional costs for your Mobility Group (Figure 62).

Figure 62 – Confirming additional costs

Are there any additional costs for your mobility group?

If you select no, you will not get the option to add additional costs listed in Annex F of the programme guide. This includes support for special educational needs and disability (SEND), exceptional costs, exceptionally expensive travel and linguistic support.

○ Yes

○ No

[Save and continue]

Additional costs can be associated with SEND Participants, any exceptional costs to support disadvantaged Participants, exceptionally expensive travel costs and linguistic support for FE/VET (Mobilities over 19 days).

If you click 'Yes' in Figure 62, then the Project Reporting Tool will navigate you through each additional cost question until complete. The following sequence navigates through each additional cost question (Figures 63-70). At each stage you should click 'Save and continue' as appropriate to proceed. Also, please refer to Part 1 for additional cost criteria.

Figure 63   Additional costs SEND Participants

Are there any additional costs to support learners with special needs and disabilities (SEND)?

Read Annex F in the programme guide for guidance on additional costs.

◯ Yes

◯ No

Save and continue

Figure 64 – Additional costs SEND Participants details

Provide details of the support you need for learners with SEND

Read Annex F in the programme guide for guidance on additional costs.

What is the estimated total additional cost to support learners with SEND?

Estimated cost

£ [   ]

Why do you need this support?

Describe what the additional costs are for and how they will support learners with SEND.

[   ]

You have 500 words remaining

Save and continue

Figure 65 - Additional exceptional costs

Do you have any exceptional costs?

This includes additional costs to support disadvantaged participants, such as:

- passports
- visas
- insurance

◯ Yes

◯ No

Save and continue

Figure 66 – Additional exceptional costs details

Provide details of your exceptional costs

What is the estimated total of the exceptional costs?

Estimated cost

£ [   ]

Why do you need this support?

Describe what the exceptional costs are for.

[   ]

You have 200 words remaining

Save and continue

Figure 67 - Additional exceptionally expensive travel costs

Does your mobility group have any exceptionally expensive travel costs?

Read Annex F in the programme guide for guidance on exceptionally expensive travel.

○ Yes

○ No

Save and continue

Figure 68 – Additional exceptionally expensive travel costs travel details

Provide details of your exceptionally expensive travel costs

What is the estimated total of your exceptionally expensive travel costs?

You will be required to provide evidence when claiming for these costs.

Estimated cost

£ [   ]

Why do you need this support?

Describe what the exceptionally expensive travel costs are for.

[   ]

You have 200 words remaining

Save and continue

Figure 69 - Additional costs linguistic support (FE/VET only)

Do you need linguistic support?

Read Annex F in the programme guide for guidance on linguistic support.

◯ Yes

◯ No

Save and continue

Figure 70 – Additional costs linguistic support requirement

How many of your participants need linguistic support?

Number of participants

[ ]

Save and continue

Having completed all cost requirements, you are directed to a summary page where you can check the information you have provided (Figure 71). As with the process of updating Mobility Groups, you have the option of changing any of the fields that you have entered. Once satisfied, click 'Save and continue' and you will return to the Mobility Groups overview page.

Figure 71 – Mobility Group details summary

Check your answers

Once you submit this mobility group it will go through the approval process.

Make any changes using this link

Mobility group details

Mobility group name	Agriculture Netherlands trip	Change
When does your mobility group start?	March 2023	Change
Summary of your mobility group	Traineeship in Denmark will help us take part in work experience overseas and be emersed within the Danish culture. The work environment will give you a hands-on approach to the ins and outs of the ship building industry. You will genuinely benefit from the experience of your co-workers who will ask you to step out of your comfort zone and take on a leading position in engaging with actors from different backgrounds. Interning abroad will teach you how to interact with people from all around the world, so you too can contribute to the field while gaining strong relational skills. All in all, an internship in the Ship building industry in Denmark will give us the unique opportunity to gain a set of skills to boost your career in the industry, making you invaluable to future employers.	Change
Mobility group type	Learner Mobility Traineeship	Change
Total learner participants	5	Change

Once back in the Mobility Groups overview page, you will be able to see your new Mobility. Please note that the requested change is in draft. Once you are satisfied that all details are correct, then 'Mark as complete'.

Figure 72 – Mobility Groups overview new Mobility

You will then be prompted to confirm or validate the Anticipated Point of Expenditure. If it is a new month, please indicate how long before the start of the Mobility Group you wish to receive the payment (Figure 73). If it is an existing month, the Project Reporting Tool will list your new Mobility Group in the relevant payment period (Figure 74). On completion of either option, click 'Continue'.

Figure 73 - Confirming your new Anticipated Point of Expenditure

What is your anticipated point of expenditure for October?

This is how long before your mobility groups start in October that you will need to receive the payment.

○ 1 month before the start month

○ 2 months before the start month

Save and continue

Figure 74 – Informing your Anticipated Points of Expenditure have changed

Your anticipated points of expenditure have changed

This is because you have moved the start month of one or more mobility groups and the anticipated point of expenditure has been aligned with the mobility group(s) already starting in that month. Your anticipated point of expenditure is when you will need to receive the payment for a mobility group.

Traineeship in Korea

New start month	March 2023
Anticipated point of expenditure	January 2023

Ship building in Denmark

New start month	April 2023
Anticipated point of expenditure	March 2023

Continue

You will be asked to update your Participant list and you will be directed to follow the process as presented previously at Figures 38-40.

The final stage in this process is for you to check your answers. Please note, you only have the opportunity to change your Point of Expenditure and/or your Participant list. However, if you don't wish to proceed, then, you can cancel all changes.

Once you are satisfied that your new Mobility Group has been inputted correctly, scroll to the bottom of the page and press submit (Figure 75).

Figure 75 - Mobility Group change request - check your answers

Check your answers

You cannot change your mobility groups at this stage

Change request purpose

What do you need to update	Update both mobility groups and participants list

Mobility groups change request

Change request type	New
Mobility group name	Agriculture Netherlands trip
When does your mobility group start?	March 2023

The process concludes with a confirmation message (Figure 76) and details of what happens next. Also, you have access to the status and detail of your proposed new Mobility Group in the application overview (Figure 77).

Figure 76 – Confirmation of change request submission

Change request submitted

Your reference number
HDJ2123F-CR15012023

We've sent you a confirmation email.

What happens next

We'll let you know if your changes have been approved or not, or if we have any questions.

If your changes are approved, your budget summary and project plan will be updated.

You can request further information by contacting us if you wish to.

Return to dashboard

Figure 77 - Updated application overview

Application overview

Application number:
HDJ2123F

Project end:
Tuesday 31 August 2023

Programme guide:
View the Turing Scheme programme guide

Submitted application

View your application

Approved budget and project plan

View your approved budget summary

View your approved project plan

Update participant list and/or project plan

Upload participants list and update mobility groups

Change request: HDJ2123F-CR07112022 — CHANGE REQUEST APPROVED

Change request: HDJ2123F-CR09122022 — MORE INFORMATION REQUIRED

Change request: HDJ2123F-CR28122022 — CHANGE REQUEST REJECTED

Change request: HDJ2123F-CR08012023 — CHANGE REQUEST SUBMITTED

Change request: HDJ2123F-CR13012023 — CHANGE REQUEST IN PROGRESS

Note the status tags and whether you have to return to your change request to submit further information

Removing a Mobility Group

You may need to remove a Mobility Group from your Project for a particular reason. This is a simple process and follows a similar flow as that of the change processes above. This change will also require approval to take effect.

Having logged into your Project Reporting Tool dashboard (Figure 2), navigate to your application overview (Figure 3) and click the 'Update Mobility Group' link. You will then be asked what part of your Mobility you wish to update. You will need to select 'Update both Mobility Groups and Participants list' (Figure 37).

You will now be viewing your listed Mobilities (Figure 55). To cancel a Mobility, click the 'Remove' link against the Mobility you no longer require.

Figure 78 - Remove Mobility Group

Following the above action, you are presented with the following view and are required to mark this as complete (Figure 79).

Figure 79 – Mark Mobility Group removal as complete

IMPORTANT

You will then be asked to download and complete a Participant list, uploading back into the Project Reporting Tool. This is to ensure that the Participants no longer participating in the Mobility Group are removed and this will be examined in the approval process. The process for managing Participants is the same as before, depicted in Figures 38-40.

If you are removing a Mobility Group but haven't entered any participant details yet, you will need to upload an empty spreadsheet.

Your final view is a summary page that requires you to check your answers (Figure 80). In this case it is the complete detail of the Mobility Group that you are removing.

Note: You only have the options to change your Participant list or cancel all changes. Otherwise, scroll to the bottom of the page and press 'Submit' and the change request will be sent for approval (Figure 77). You will receive a confirmation and reference number (Figure 78).

Your change request will now feature in your application overview in the 'Update Project Plan' list and can be viewed by clicking its named hyperlink. Its status will be displayed and you will be able to view the decision once the change has been assessed and determined.

Figure 80 – Final validation of Mobility Group removal prior to submission

Figure 81 – Confirmation of change request submission

Change request submitted

Your reference number
HDJ2123F-CR15012023

We've sent you a confirmation email.

What happens next

We'll let you know if your changes have been approved or not, or if we have any questions.

If your changes are approved, your budget summary and project plan will be updated.

17. Monthly report

The Turing Scheme requires you to submit a Monthly Report. You will be automatically notified on a monthly basis, by email, that your report is due.

When you receive this email and are ready to write your report, please log into the Project Reporting Tool. In your dashboard you will see the Monthly Report link (Figure 82). Click where indicated to go to the Monthly Reports overview page where the required Monthly Report will be listed (Figure 83). Previous reports will also be listed with their status.
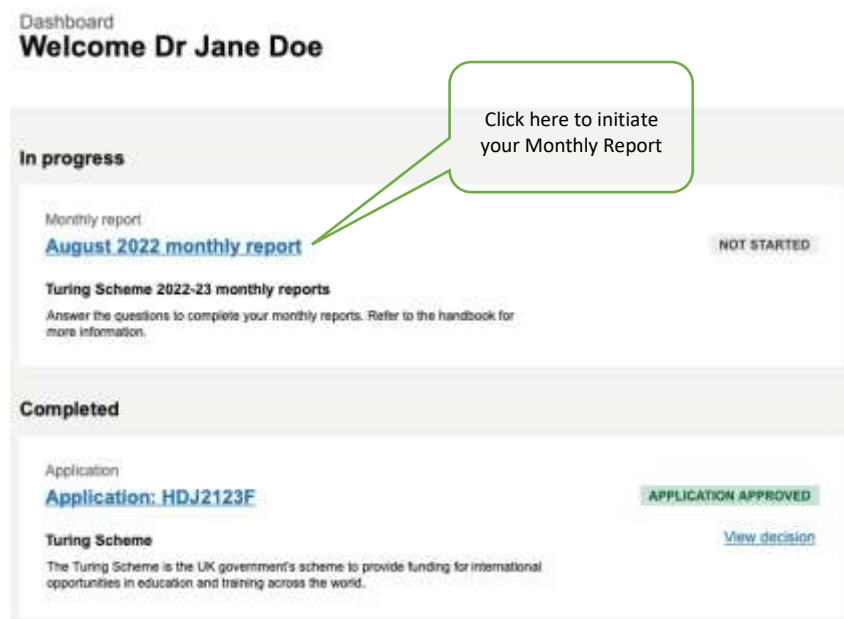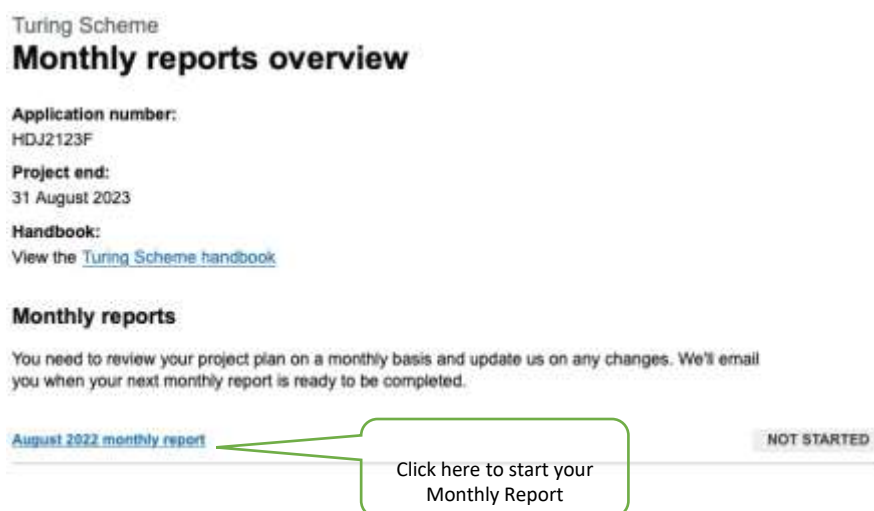
Figure 82 – Project dashboard Monthly Report

Figure 83 – Monthly Reports overview

Having clicked the link, you are firstly prompted to consider if you need to make any changes to your Project Plan (Figure 84). If your answer is 'Yes', then you will be directed back to your application overview from where you are to submit a change request (Figure 85).

Note: This must be done before you submit your Monthly Report and then referenced in the Report accordingly.

You can save and return to your Monthly Report at any time during this process by using the link. Otherwise, press 'Save and continue' to proceed in all stages.

Figure 84 – Monthly Report change prompt

Figure 85 - Report change direction

If you select 'No' in Figure 84, then you will be directed to a page that asks if you need to reallocate any budget from your Organisational Support to another area of your Project Plan (Figure 86).

You can reallocate Organisational Support budget and use it within your Mobility Groups, in line with change control rules set out in Annex 11 of the Grant Funding Agreement. If you wish to do so, you can indicate this here. The Delivery Partner may contact you to record details of this reallocation, especially if the budget is going to be used to send further Participants on Mobilities.

If this is required, select 'Yes', then 'Save and continue' and then provide your rationale and the amount to be transferred (Figure 87).

If you don't wish to redirect any Organisational Support costs, then check 'No' and 'Save and continue'.

Figure 86 – Budget re-allocation prompt

Do you need to re-allocate budget from your organisational support to another area of your project plan?

For example, you can re-allocate budget from your organisational support to another mobility group. This would not effect the approved budget for the mobility group.

○ Yes

○ No

Save and continue

Figure 87 - Budget reallocation explanation and amount

Explain where you want to re-allocate your organisational support budget and the estimated amount

Describe where you want to re-allocate budget from your organisational support and what you will use it for. This will not effect your overall approved project plan budget.

You have 500 words remaining

Estimated amount

For example, £5455 or £5455.20

£

Save and continue

You are now at the Monthly Report writing stage (Figure 88).

Pease note that there is a 500-word limit The report should cover all aspects of your Project's progress to date.

Figure 88 - Report update

Monthly progress report update: August 2022

Please provide an update on the progress of your project. You should tell us whether implementation and progress are happening as expected or whether there have been any changes. This includes, if:

* your participants have changed
* you have made a change to your project plan

You have 500 words remaining

Save and continue

On completion, you will be directed to provide a report declaration and will need to check the 'I agree' box in order to proceed to submission (Figure 89).

Figure 89 – Monthly Report declaration

Monthly report declaration

I confirm that:

- the information I have provided as part of my monthly report is true and accurate
- I have shared or will share the Turing Scheme privacy notice with all the pupils/learners/students from my organisation who are participating in the Turing Scheme
- my participant list is up to date

☐ I agree

Check this box to complete the declaration

Save and continue

Save and return to payment request overview

The final stage in the Monthly Report process is to check your answers and then submit your report. You can change any of your responses prior to submission by clicking through the corresponding link (Figure 90).

Figure 90 – Check and submit your Monthly Report

You will receive a confirmation message and reference number (Figure 91) as well as a confirmation email which will be sent immediately after report submission.

Figure 91 - Report submission confirmation

Monthly report submitted

Your reference number
HDJ2123F-MR15082022

We've sent you a confirmation email.

What happens next

We may contact you with questions regarding your monthly report.

We'll send you an email when your next monthly report is ready to be completed.

Finally, the Project Reporting Tool will automatically update your dashboard showing 'In progress' and 'Completed' actions (Figure 92) and you can view your report submission by navigating through the links. You will receive an email when you next Monthly Report is ready to be completed.

Figure 92 – Updated dashboard

In progress

Reports overview
September 2023 monthly report: HDJ2123F-MR15012023   MONTHLY REPORT SUBMITTED

Turing Scheme 2022-23 reports overview   View report
Answer the questions to complete your mandatory monthly reports and final report. Refer to the handbook for more information.

Payment request
Make a payment request   PAYMENT REQUEST DRAFT

Turing Scheme 2022-23 payment requests
Answer the questions to complete your monthly reports. Refer to the handbook for more information.

Completed

Application
Application: HDJ2123F   APPLICATION APPROVED

Turing Scheme   View decision
The Turing Scheme is the UK government's scheme to provide funding for international opportunities in education and training across the world.

18. Safeguarding

Safeguarding is an important aspect of the Turing Scheme and it is critical that incidents are reported correctly. To report a safeguarding incident, either log in to your Project Reporting Tool and navigate on the top menu bar to Safeguarding or just click directly on the Safeguarding link on the Welcome screen. You will be presented with the following form (Figure 93 - extract). Complete this in all aspects and then click 'Submit'. You will receive a confirmation message (Figure 94) and we will call you on your contact number as soon as we can to follow up.

Figure 93 – Safeguarding form

Report a safeguarding incident

This form is intended to notify the Turing Scheme Administrator (TSA) of a safeguarding incident. You will be aware that the Grant Funding Agreement stipulates that the Beneficiary must report all child protection incidents, allegations, and concerns the TSA immediately, this includes those that do not meet the threshold requiring the safeguarding lead or head teacher to be alerted. It is the responsibility of the beneficiary to ensure that safeguarding procedures are followed.

Please do not share personal information about the incident you are reporting on this form. A follow up call with the relevant beneficiary will be actioned as necessary.

Contact details

Application number
You can find this in the application overview.
For example, 'APP-1A2B3C'

Beneficiary name
This is the institution involved in the safeguarding incident

Contact phone number of individual raising the notification
Include the country code for international numbers

Contact name

Incident details

Date of incident
For example, 18 05 2022

Day   Month   Year

Figure 94 – Safeguarding confirmation message

We've received your safeguard report

What happens next

We will call you on your contact phone number as soon as we can.

19. Final Report

On completion of your Mobilities and required Monthly Reports, you are required to submit a Final Report. The process for this is similar to Monthly reporting. However, more detail is required to let us know how the aims and objectives of the Project were met, the impact it achieved and to reconcile final payments or to initiate recoveries. The Final Report is divided into a number of sections and this guide will follow the same sequence.

When your Final Report is due, you will receive an email instructing you to complete and submit your Final Report within 28 days (which is also the requirement in order to receive the remaining 20% of your eligible Project costs).

After signing into the Project Reporting Tool, a prompt will be displayed in your dashboard (Figure 95). Click through the Final Report link which will take you to your reports overview, and you will see all completed Monthly Reports and a link to initiate the Final Report process (Figure 96).

Figure 95 – Dashboard Final Report prompt

Figure 96 – Report summary view

Monthly reports

You need to review your project plan on a monthly basis and update us on any changes. We'll email you when your next monthly report is ready to be completed.

September 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
October 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
November 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
December 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
January 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
February 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
March 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
April 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
May 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
June 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
July 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
August 2023 monthly report: HDJ2123F-MR15082023	MONTHLY REPORT SUBMITTED

Final report

You must complete and submit your final report to receive the remaining 20% of your eligible project costs.

2022/23 Final report Click here to start your Final Report	NOT STARTED

Preliminary checks

Prior to commencing your Final Report, it is important that your Participant list is up to date, and you do not have any outstanding Payment Requests. Therefore, the preliminary part of the Final Report process requires you to confirm that they are completed and if not, you are required to do so. The Participant list confirmation steps are at Figures 97a and 97b. The Payment Request confirmation steps are at Figures 98a and 98b.

Figure 97a – Participant list confirmation

Is your participants list up to date?

The information in your participants list must be complete and up to date before you submit your final report.

○ Yes

○ No

Select your response

Save and continue

Save and return to reports overview

Figure 97b – Return to application overview to complete Participant list.

You need to update your participants list before submitting your final report

Return to the application overview to update your participants list. These changes may need to be approved before you can submit your final report.

Return to application overview

If you checked 'No' in Figure 97a, click here to return to your application overview and update your Participant list.

Figure 98a – Payment Request confirmation

Are all your payment requests submitted?

You must have submitted all your payment requests before you submit your final report.

○ Yes

○ No

Select your response

Save and continue

Save and return to reports overview

Figure 98b – Return to application overview to complete Payment Request

You need to request all your payments before submitting your final report

You need to make all your payment requests in the payment requests overview before you can submit your final report.

Return to payment requests overview

> If you checked 'No' in Figure 98a, click here to return to your Payment Requests overview

By checking the 'Yes' you are confirming that your Participant list and Payment Requests are up to date. You will then be presented with an instruction page detailing the sections you will need to complete and the information you will need to have ready (Figure 99).

If you do not have all the information ready, you can save your progress and continue at a later date when you have collated all the information required.

Figure 99 – Before you start

Before you start

Your mobility groups and participants list must be up to date before starting the final report. If they need updating, do this in application overview.

Sections to complete

1. Driving positive impact and value for money
2. International engagement
3. Levelling up
4. Grant funding agreement annex
5. Final report declaration

Information you'll need to have ready

When completing your final report, it will help to have the following ready:

- your original project aims and objectives
- your institution or organisation's priorities
- the positive outcomes your project delivered
- your budget summary
- your new international partnerships

Download your grant funding agreement annex

If you're a school, a local authority or are receiving £40,000 or less, download annex 10.

If you're not a school or local authority and are receiving £40,000 or more, download annex 9.

Continue

Save and return to reports overview

> Use this link to save your progress and return later. This link is available on all Final Report sections.

Tip – A number of questions require you to enter a written response in a maximum of 150 words. You may wish to prepare this input in a separate document and then copy and paste the text where required. This will allow you to edit your input, manage the word count requirement and share with colleagues (if you wish) before submitting.

Driving positive impact and value for money

The aims of the Turing Scheme are to contribute to the UK Government's commitment to a Global Britain, funding Projects that deliver high quality placements, support social mobility and widen participation across the UK. Projects will offer unique, career-building opportunities, helping Participants to develop key skills and deliver value for UK taxpayers. This section asks you to report on your Project's aims and objectives, and whether you have achieved these.

The first question requires you to report on how many of your original aims and objectives were met (Figure 100) and then how aligned to your institution or organisation's priorities was your Project (Figure 101) followed by an assessment of your Project's impact (Figure 102).

Figure 100 – Reporting on aims and objectives

How many of your original project aims and objectives were met?

○ All of them

○ Most of them

○ Around half of them

○ Fewer than half of them

○ None of them

Select your response

Save and continue

Save and return to reports overview

Figure 101 – Reporting on alignment of priorities

How aligned to your institution or organisation's priorities was your project?

○ All of the priorities were aligned

○ Most of the priorities were aligned

○ Around half of the priorities were aligned

○ Fewer than half of the priorities were aligned

○ None of the priorities were aligned

Select your response

Save and continue

Save and return to reports overview

Figure 102 - Reporting on Project impact

How many participants had a positive impact benefited by undertaking your project?

○ All of them

○ Most of them

○ Around half of them

○ Fewer than half of them

○ None of them

Select your response

Save and continue

Save and return to reports overview

You are now required to provide a narrative on your learning outcomes (Figure 103).

Figure 103 - Reporting on learning outcomes

What learning outcomes did your participants achieve and how were these outcomes assessed and recognised?

You have 150 words remaining

Save and continue

Save and return to reports overview

Next, please describe any additional activity that was funded through your project that would not have been possible otherwise (Figure 104).

Figure 104 - Reporting on additional activity

Describe any additional activity that was funded through your project that would not have been possible otherwise

You have 150 words remaining

Save and continue

Save and return to reports overview

We would like to know if the cost of living and travel grants were adequate (Figure 105). If you answer 'No', then we ask you to provide us with feedback on why they were insufficient (Figure 106).

Figure 105 – Reporting on cost of living and travel grants

Were the cost of living and travel grants enough to support the participants of your project?

◯ Yes

◯ No

Select your response

Save and continue

Save and return to reports overview

Figure 106 - Explanation for insufficient cost of living and travel grants

Why were the cost of living and travel grants not enough to support the participants of your project?

You have 150 words remaining

Save and continue

Save and return to monthly reports overview

International engagement

The Turing Scheme provides Participants with the opportunity to gain international experience which improves language and soft skills as well as a better understanding of other cultures. In addition, organisations can build relationships with international peers and gain fresh ideas. It is these aspects which we would like you to now report on.

This section commences by asking you to report on any increase in international scope for your organisation (Figure 107), if you were able to enhance existing international partnerships (Figure 108) and then whether you started a new international partnership (Figure 109).

Figure 107 – Reporting on international scope

How much did the project increase the international scope of the organisation?

○ Greatly

○ Moderately   Select your response

○ Slightly

○ None at all

Save and continue

Save and return to reports overview

Figure 108 - Reporting on enhancing international partnerships

How much did the project enhance your existing international partnerships?

○ Strongly enhanced

○ Somewhat enhanced ⟶ Select your response

○ None at all

○ Somewhat worse

○ Much worse

Save and continue

Save and return to reports overview

Figure 109 – Reporting on international partnerships

Did you start new international partnerships as a result of your project?

○ Yes

○ No ⟶ Select your response

Save and continue

Save and return to reports overview

If you answered 'Yes' to the above (Figure 109), then there are two supplementary questions concerning how straightforward this was (Figure 110) and for you to describe how the partnership was started (Figure 111).

Figure 110 - Experience of establishing international partnerships

How straightforward was the process of starting new international partnerships?

- ○ Very easy
- ○ Easy
- ○ Neutral
- ○ Difficult
- ○ Very difficult

Select your response

Save and continue

Save and return to reports overview

Figure 111 – Description of how the international partnership was started

Describe how you started new international partnerships

You have 150 words remaining

Save and continue

Save and return to reports overview

If you answered 'No' to starting an international partnership (Figure 109), then you will be asked to provide details of any barriers (Figure 112).

Figure 112 - Enquiring on barriers to establishing international partnerships

What were the barriers to starting new international partnerships?

For example, you were not looking for new international partners or you needed more time to build relationships.

You have 150 words remaining

Save and continue

Save and return to reports overview

The Turing Scheme promotes the forging of new relationships around the world and the enhancement of existing international ties. We would like to understand how you selected your destination countries and/or different partnerships (Figure 113).

Figure 113 – Selection criteria for destination countries and/or partnerships

Why did you choose your destination countries and/or different partnerships?

You have 150 words remaining

Save and continue

Save and return to reports overview

We would like to understand whether your partnership arrangements were reciprocal. Reciprocal partnerships refer to international overseas individuals travelling to the UK as part of the partnership. If you have started or continued a reciprocal international arrangement we would like to know more and the sequence of questions in Figures 114 – 118 enquires about this.

Figure 114 - Enquiring on reciprocal international arrangements

Did your project involve a reciprocal international mobility partnership?

○ Yes

○ No

Select your response

Save and continue

Save and return to reports overview

If the answer to the above is 'Yes', then you are asked to expand on the numbers and details (Figure 115).

Figure 115 – Enquiring on barriers to establishing international partnerships

Your reciprocal international mobility partnership

How many reciprocal participants did you receive?

Were you aware if any reciprocal participants were from lower socio-economic backgrounds or identified as having special educational needs and disabilities?

Provide details but do not include any personal information. A reciprocal international mobility partner is an overseas provider you have a partnership with. This means you do not just send learners to them, but also receive learners in exchange.

You have 150 words remaining

Save and continue

Save and return to reports overview

If you answer 'No' then you are required to indicate if you plan to continue collaborating with the international partners involved in your project (Figure 116).

Figure 116 – Enquiring on continuation with international partnerships

Do you plan to continue collaborating with the international partners involved in your project?

◯ Yes

◯ No

Select your response

Save and continue

Save and return to reports overview

If you answered 'No' to the above question, then you are to indicate your reasons on the next screen (Figure 117).

Figure 117 – Rationale for discontinuing international partnerships

Why do you not plan on continuing to collaborate with the international partners involved in your project?

You have 150 words remaining

Save and continue

Save and return to reports overview

If you do intend to continue to collaborate with international partners and have responded 'Yes' in Figure 116, then please indicate which partners you intend to continue to collaborate with (Figure 118).

Which international partners will you continue to collaborate with?

You have 150 words remaining

Save and continue

Save and return to reports overview

Levelling up

Turing Scheme Projects should support social mobility and widen access across the UK, promoting equal access and opportunities to all learners regardless of their background. The section asks you to report on how you met the criteria and commentary, referring to your original aims on how they would be beneficial, so the impact can clearly be seen.

The questions on how your project reached participants from lower socio-economic backgrounds or with additional educational needs are at Figures 119 and 120.

Figure 119 – Reporting on disadvantage and SEND participation

Describe how your project reached participants from lower socio-economic backgrounds or with additional educational needs.

You have 150 words remaining

Save and continue

Save and return to reports overview

Figure 120 - Reporting on the actual support disadvantaged/SEND Participants received

Grant Funding Agreement

You have a legal requirement to certify how your grant was used. Depending on the level of Grant awarded, you must complete either:

- **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.

Or,

- **ANNEX 10 – STATEMENT OF GRANT USAGE**

  This section must be completed by local authorities and Maintained Schools, or other Grant Recipients in receipt of Grants of £40,000 or less. This is to provide independent assurance that funds have been used for the delivery of Funded Activities.

Figure 121 presents these options and you are required to download, complete your respective Grant Funding Agreement annex and upload into your portal.

Figure 121 - Download Grant Funding Agreement annex

Download and complete the correct grant funding agreement annex

Download the correct grant funding agreement annex depending on if you are a school and how much you are receiving for your grant. This number is your total approved budget cost (after any changes), which you can see in the budget summary.

If you're a school, a local authority or are receiving £40,000 or less

Download annex 10 agreement

If you're not a school or a local authority and are receiving more than £40,000

Download annex 9 agreement

Save and continue

Save and return to reports overview

Once you have completed the annex, please upload the file into your portal (Figures 122 and 123).

Figure 122 – Grant Funding Agreement annex upload (1)

Upload your grant funding agreement annex

If you have not downloaded the grant funding agreement, you need to return to the previous page to do so.

Choose file | No file chosen

Save and continue

Save and return to reports overview

Upload your grant funding agreement annex

If you have not downloaded the grant funding agreement, you need to return to the previous page to do so.

Your grant funding agreement annex

Title	Action
grant-funding-agreement-annex.doc	Remove

Save and continue

Save and return to reports overview

Final section

The final section asks if you would be willing to take part in research about the Turing Scheme and your experience of participation ([Figure 124]). Then complete the declaration confirming that the Grant received and spent has been used wholly for the purpose for which it was given ([Figure 125]).

Are you willing to take part in research about the Turing Scheme and your experience of participating?

◯ Yes

◯ No

Select your response

Save and continue

Save and return to reports overview

Figure 125 - Final Report declaration

Final report declaration

I confirm that the grant received and spent has been used wholly for the purpose for which it was given.

☐ I agree — Complete this check box

Save and continue

Save and return to reports overview

Prior to submission, you can check all and amend any of your answers (Figure 126). Once you are satisfied click submit at the end of the page (Figure 127).

Figure 126 – Final Report check your answers

Check your answers

Final report: Project year 2022/23

How many of your original project aims and objectives were met?	Around half of them	Change
How aligned to your institution or organisation's priorities was your project?	Most of the priorities were aligned	Change
How many participants had a positive impact benefited by undertaking your project?	All of them	Change

Figure 127 - Final Report check your answers and submit

Your grant funding agreement annex	grant-funding-agreement-annex.doc	Change
Permission to contact your partners	Yes	Change
Final report declaration	I agree	Change

Submit

Following submission, you will receive a confirmation message (Figure 128), followed instantaneously by an email.

Figure 128 - Final Report confirmation

Post submission

In returning to your dashboard, you will see that your Final Report has been annotated as 'Final Report Submitted' (Figure 129) and by clicking through to the Reports overview you will see that you have completed your reporting obligations, with all reports submitted (Figure 130).

The Turing Scheme team will contact you if there are any further questions, as well as emailing you with information about your final payment or recovery of any unspent funds.

Figure 129 - Completed dashboard

Figure 130 - Completed report view

Monthly reports

You need to review your project plan on a monthly basis and update us on any changes. We'll email you when your next monthly report is ready to be completed.

September 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
October 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
November 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
December 2022 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
January 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
February 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
March 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
April 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
May 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
June 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
July 2023 monthly report: HDJ2123F-MR15082022	MONTHLY REPORT SUBMITTED
August 2023 monthly report: HDJ2123F-MR15062023	MONTHLY REPORT SUBMITTED

Final report

You must complete and submit your final report to receive the remaining 20% of your eligible project costs.

2022/23 Final report: HDJ2123F-FR2022-23	FINAL REPORT SUBMITTED

Intentionally blank

Intentionally blank