GUIDE
FOR APPLICANTS

SCHOLARSHIP AND TRAINING FUND

PREPARATORY VISITS

Call for proposals
January 2013

Deadline for applications:
from 10th January 2013 to 11th March 2013
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1. GENERAL INFORMATION

1.1. General information about Financial Mechanisms

The Norwegian Financial Mechanism and the EEA (European Economic Area) Financial Mechanism are the sources of non-refundable aid for Poland, offered by three countries - members of the EFTA (European Free Trade Association), which are also members of EEA (European Economic Area) i.e. Norway, Iceland and Liechtenstein.

Scholarship and Training Fund was created on the basis of Memorandum of Understanding of implementing of Financial Mechanism EEA 2009-2014 between Iceland, Liechtenstein, Kingdom of Norway and Poland, as well as on the basis of Memorandum of Understanding of implementing of Norwegian Financial Mechanism 2009-2014 between Kingdom of Norway and Poland.

Foundation for Development of Education System acts as a Programme Operator of Scholarship and Training Fund in Poland.

Strategic Aim

The main purpose of the Fund will be to reduce the social and economic disparities within the European Economic Area and to strengthen bilateral relations between Poland, Norway, Liechtenstein and the Kingdom of Norway in the area of education.

Operational Aim

The aim of the Fund will be enhancement of the human capital and knowledge base through:

- increased higher education staff and students mobility between Poland and Donor States,
- increased and strengthened institutional cooperation and partnership at all levels of the education sector (schools, higher education, vocational training/education and adult education) between Poland and Donor States.

Additionally, activities undertaken under the Mechanisms should cover various horizontal aspects which improve quality of implemented projects, while increasingly contributing to the achievement of social and economic cohesion.

The main horizontal aspects include:

- sustainable growth that integrates the environmental, economic and social dimensions,
- equal opportunities for men and women,
- good governance, which is characterised by participation of a wide group of partners in the decision-making process and taking decisions in compliance with the law and clear rules, as well as fighting corruption.

More information on the horizontal issues may be found in official documents of the Financial Mechanisms available at http://www.fss.org.pl/en

1.2. Programme Documents

During the implementation of Preparatory Visit the Project Promoter is obliged to undertake activities in accordance with the following programme documents:
1. All guidelines referring to the Programme implementation adopted by the Operator, Ministry of Regional Development for the EEA Grants and Norway Grants 2009-14, or the EEA Financial Mechanism Committee/ Norwegian Ministry of Foreign Affairs;

2. Memorandum of Understanding on the implementation of the EEA Financial Mechanism 2009-14 between Iceland, the Principality of Liechtenstein and the Kingdom of Norway and the Republic of Poland, signed on 17 June 2011, along with the attachments;

3. Memorandum of Understanding on the implementation of the Norwegian Financial Mechanism 2009-14 between the Kingdom of Norway and the Republic of Poland, signed on 10 May 2011, along with the attachments;

4. Regulation on the implementation of the European Economic Area (EEA) Financial Mechanism 2009-2014;

5. Regulation on the implementation of the Norwegian Financial Mechanism 2009-2014.

### 2. WHO IS ELIGIBLE FOR SUPPORT

#### 2.1. General information

The Scholarship and Training Fund was established to support the process of improving the quality of education at Polish educational institutions, with special regard to higher education institutions. The Fund also aims at the enhancement of human capital and broadening of knowledge through, among others, fostering the mobility of pupils, students as well as education staff between Poland and the Donor States. The Fund also supports projects which aim to enhance the capacity of staff and institutional structures to participate in international cooperation. Thus projects submitted to the STF should be designed to achieve these objectives.

#### 2.2. Applicants

Applicants eligible for financial support under *Preparatory Visits* are Polish educational institutions interested in cooperation on common future projects with educational institution from at least one of the Donor States: Norway, Iceland or Liechtenstein. Eligible for support are also educational institutions from Donor States which plan to implement a common project proposal with Polish institutions. Individual Participant of the *Preparatory Visit* might be a person employed in the applying institution who undertakes the activities planned in project proposal on behalf of the applying institution.

**Polish institutions eligible for funding:**

All institutions eligible for funding under any STF Measure: school (primary, gymnasium, secondary/high-school), HEI or other institution which deals with formal education.

For a Polish applicant a partner (hosting) institution from Iceland, Liechtenstein or Norway is required.

**Eligible institutions from the Donor States (Iceland, Liechtenstein, Norway):**

All institutions eligible for funding as a project partner under any STF Measure: school, HEI, other institution offering education at all levels of instruction, private sector - enterprises and social partners who cooperate with educational institutions, public and private organizations, including not-for-profit and NGOs, research centers.

For the applicant from Iceland, Liechtenstein or Norway a partner (hosting) institution from Poland is required.

### 3. PREPARATORY VISITS - CHARACTERISTIC

*Preparatory Visits* are short visits of representatives from educational institutions undertaken in order to:
• establish cooperation between institutions;
• maintain and develop previous inter-institutional contacts;
• prepare and schedule common project, in order to apply for funds within the Scholarship and Training Fund under the following Measures:
  o Mobility Projects,
  o Inter-Institutional Cooperation,
  o Development of Polish Higher Education Institutions
or to apply from other sources.

Duration of one visit is up to 5 working days and additionally maximum 2 days for travel.

**ATTENTION:** Institution may submit more than one application. Individual project proposal should embrace visit of one person in one programme country. All submitted applications will undergo both formal and content-related (quality) check, and in case of grant awarding will be subject of a separate agreement.

### 4. FINANCIAL ARRANGEMENTS

#### 4.1. Basic information

The total cost of a project is a sum of all eligible costs.

**Eligible costs**

The following types of costs may be covered by the STF *Preparatory Visits* grants:

- travel and insurance costs to the maximum limit of 500 €,
- subsistence costs to the maximum limit of 250 € per working day,
- additional costs related to special needs of the Individual Participant.

**Payment of the awarded grant**

- the advance payment representing maximum 80% of the grant awarded will be made after the signature of the Financial Agreement,
- the final balancing payment (not exceeding, however, 20% of the grant awarded) will be transferred after the approval of the *Completion Report* on project implementation by the STF.

The Project Promoter is not permitted to cover the same expenses from two different sources (double funding).

Expenses must be in line with the aims of the Fund and the co-funded project proposal, and be clearly supported by documents in the Completion Report to be submitted by the Applicant, and must be incurred during the eligibility period as indicated in the Financial Agreement.

#### 4.2. Financial procedures - project budget

The budget of the Project depends strictly on the duration of stay of the Individual Participant in the host institution. Total grant amount is calculated in the following basis:

**Grant amount** = subsistence costs (project duration in working days x lump sum of 250 euro) + travel and insurance costs (maximum 500 euro)
+ additional costs related to special needs of the Individual Participant (if needed)

**Subsistence costs** to co-finance the visits are lump sum. STF does not require any evidence such as receipts or invoices for documentation purposes. The basis for reimbursement will be the confirmation of the duration of the visit (original document), stamped and clearly signed by the representative of the host institution. Template of the *Certificate of Attendance* is enclosed as Attachment No. 1 to this Guide. Flat rate for subsistence costs will be calculated as a product of a number of working days of the visit and a lump sum per one working day, i.e. 250 euro. Maximum duration of the preparatory visit is 5 working days, and the maximum flat rate for subsistence costs is 1250 euro.

**ATTENTION:**
- maximum duration of stay = 5 working days + time for travel (up to 2 days)
- subsistence costs are awarded only for the actual content-related activities of the *Preparatory Visit* and will not be calculated/awarded for the weekends or time for travel. In justified cases, it is however allowed to apply for a lump sum of subsistence costs during the day for travel, provided that it is clearly stipulated in the project schedule, and later confirmed by the host institution in the *Certificate of Attendance* (submitted along with the Completion Report) that content-related activities of the *Preparatory Visit* (i.e. meeting with the representatives of the host institution, study visit in the host institution) took place for at least 4 hours during the day for travel;
- days when project activities are not implemented (e.g. Saturday or Sunday) should not divide the working days of the visit.

**Travel costs** - travel from the place of residence to the host institution and back, will be reimbursed on the basis of actual incurred costs. Maximum amount of incurred travel costs and insurance costs should not exceed the limit of 500 euro. Along with the Completion Report, the Applying Institution will be obliged to send original travel documents (e.g. tickets) and copies of invoices and/or receipts that document the actual incurred costs. The travel should be organized by the least expensive, justified means of transport (train ticket in the 2nd class, economy class flight etc.).

The actual travel costs should be evidenced with the following financial documents
- travelling by plane - by the original plane tickets (e-tickets or traditional), boarding cards, or VAT invoices, if the tickets do not state the price clearly or if the price on the ticket is lower than the actual price;
- travelling by bus - by the original ticket and alternatively by the invoice and information on the itinerary and the date of the travel, if the ticket does not state that;
- travelling by ferry - by the original ticket and alternatively by the invoice, and information on the itinerary and the date of the travel, if the ticket does not state that;
- travelling by train - by original ticket and alternatively by the invoice, if the ticket does not state the price.
- travelling by car - the travel costs are calculated on the basis of the official rates determined by the Ministry of the Infrastructure (lump-sum for 1 kilometre), up to the maximum amount for travel i.e. 500 euro. It is necessary to evidence the travel. Template document of vehicle card is enclosed to this Guide as Attachment No. 2 *Clearing of Travel Costs*.

**Eligible travel time**

**Travel costs are recognized as eligible** provided that two below conditions will be fulfilled:
- travel to the host institution will start on the first working day of the preparatory visit or one day before the first working day of the *Preparatory Visit*;
- return travel will take place on the last working day of the visit or one day after the last working day of the *Preparatory Visit*. 
Travel costs will not be reimbursed if travel is planned two or more days earlier than the first working day of the preparatory visit, and return travel is planned two or more days later than the last working day of the preparatory visit. Programme Operator will not admit 50% reimbursement in case when one part of travel takes place during the eligibility period, and the second part - outside the eligibility period.

Example

<table>
<thead>
<tr>
<th>Travel &quot;to&quot;</th>
<th>First working day of the visit</th>
<th>Last working day of the visit</th>
<th>Return &quot;from travel&quot;</th>
<th>Travel costs reimbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td>7th or 8th April 2013</td>
<td>8th April 2013</td>
<td>12th April 2013</td>
<td>12th or 13th April 2013</td>
<td>Full travel costs reimbursement</td>
</tr>
<tr>
<td>6th April or earlier</td>
<td>8th April</td>
<td>12th April</td>
<td>12th or 13th April</td>
<td>Travel costs reimbursement not eligible</td>
</tr>
<tr>
<td>7th or 8th April</td>
<td>8th April</td>
<td>12th April</td>
<td>14th April or later</td>
<td>Travel costs reimbursement not eligible</td>
</tr>
<tr>
<td>6th April or earlier</td>
<td>8th April</td>
<td>12th April</td>
<td>14th April or later</td>
<td>Travel costs reimbursement not eligible</td>
</tr>
</tbody>
</table>

Attention: Schedule of stay should be rationally planned. Days when project activities are not implemented (eg. Saturday or Sunday) should not divide the working days of the visit. Additionally, before planning the dates of departure/return travel it is advised to check the available airplane/ferry connections, in order to allow the visit to take place without any disturbances within the timeline scheduled in the project proposal, and to be in line with the declarations included in the intent and recommendation letters. Excluding the cases of “force majeure”, the Operator will not allow to introduce changes in the timeline of Preparatory Visit planned in the project proposal.

Insurance costs

Project Promoter is authorised to purchase insurance for the period of the Preparatory Visit and time for travel. The eligible costs in this category are:

- personal accident insurance enabling unexpected return home eg. in case of illness; and
- insurance for the civil liability covering any potential damage that the Individual Participant may cause during the project.

The insurance costs will be reimbursed on the basis of actual incurred costs after the approval of the Completion Report. After submitting the Completion Report, the Project Promoter may be asked to submit the original insurance document. If purchase cost is not shown on the insurance document, it should be accompanied by the appropriate accounting document.

Maximum limit for travel and insurance costs should not exceed 500 euro. Should this limit be exceeded, the difference shall be paid from the Project Promoter’s own funds.

Additional insurance (extended liability insurance) that covers also health care/medical treatment costs in the host country is not eligible. The Operator will recognize health care/medical treatment costs only if it is an integral element of the basic insurance package. Other costs which result from extending the insurance liability to additional elements (eg. luggage insurance, extreme sports) shall be recognized as ineligible.
The whole insurance cost shall be recognized as ineligible, if:

- the insurance will cover a longer period than the eligibility period mentioned in the Financial Agreement with the Operator, including the allowed time for travel;
- Project Promoter purchased the extended insurance liability, which is different from the one described above as eligible;
- and it is not possible to determine and/or divide the particular elements of the insurance package.

Additional costs related to special needs of the Individual Participant.

In justified cases, the Operator assumes the possibility of awarding additional funding for costs related to special needs of the Individual Participant of the Preparatory Visit. Eligible for support are people registered as disabled (appropriate valid, e.g. not older than 3 months, letter of confirmation from social security institution is required). The Operator will decide on approval of the additional funding on the basis of documents submitted with the application form.

Clearance of costs will be reimbursed on the basis of actual incurred costs related to the enhanced travel and subsistence costs in case of participants with special needs. Along with the Completion Report, the Project Promoter is obliged to submit appropriate receipts and/or invoices which document the additional costs incurred due to disability.

Funding related to special needs may be consumed to finance the following costs:

- transportation costs of eg. wheelchair for the disabled;
- travel and subsistence costs of the accompanying person (to the maximum level of lump sums which accrue the STF Individual Participant);
- costs of local guardian;
- costs of special tutoring material;
- costs of medical treatment;
- costs of special liability insurance;
- other costs - after prior consultation and acceptance of the Operator.

Acceptable methods of documenting additional costs related to special needs of the Individual Participant, on the basis of actual incurred costs, are described below:

Subsistence and insurance costs of the accompanying person

Subsistence costs to co-finance the visits are lump sum. The Operator does not require any evidence such as receipts or invoices for documentation purposes. The basis for reimbursement will be the declaration of will of the Individual Participant and the accompanying person who confirm the duration of stay of the accompanying person. Flat rate for subsistence costs will be calculated as a product of a number of working days of the visit and a lump sum per one working day, i.e. 250 euro. Maximum duration of the Preparatory Visit is 5 working days, and the maximum flat rate for subsistence costs is 1250 euro.

Attention:
- maximum duration of stay = 5 working days + time for travel (up to 2 days)
- subsistence costs are awarded only for the actual content-related activities of the Preparatory Visit and will not be calculated/awarded for the weekends or time for travel. In justified cases, it is however allowed to apply for a lump sum of subsistence costs during the day for travel, provided that it is clearly stipulated in the project schedule that content-related activities of the Preparatory Visit (i.e. meeting with the representatives of the host institution, study visit in the host institution) took place for at least 4 hours during the day for travel;
- days when project activities are not implemented (e.g. Saturday or Sunday) should not divide the working days of the visit.

If the help of the accompanying person is limited to short stays (e.g. accompanying the Individual Participant in travel to/from the host institution), every stay is calculated separate i.e. time of stays is not cumulated.

**Travel costs of the accompanying person:**

The actual travel costs should be evidenced with the following financial documents:

- travelling by plane - by the original plane tickets (e-tickets or traditional), boarding cards, or VAT invoices, if the tickets do not state the price clearly or if the price on the ticket is lower than the actual price;
- travelling by bus - by the original ticket and alternatively by the invoice and information on the itinerary and the date of the travel, if the ticket does not state that;
- travelling by ferry - by the original ticket and alternatively by the invoice, and information on the itinerary and the date of the travel, if the ticket does not state that;
- travelling by train - by original ticket and alternatively by the invoice, if the ticket does not state the price.
- travelling by car - the travel costs are calculated on the basis of the official rates determined by the Ministry of the Infrastructure (lump-sum for 1 kilometre), up to the maximum amount for travel i.e. 500 euro. It is necessary to evidence the travel. Template document of vehicle card is enclosed to this Guide as Attachment No. 2 Clearing of Travel Costs. If the accompanying person is travelling together with the Individual participant, the cost of travelling by private car may be reimbursed only once.

**Travel costs for accompanying person are legible,** if two conditions are fulfilled at the same time:

- travel to the host country will take place on the first working day of the visit or one day prior to the start of the working visit;
- return travel will take place on the last working day of the visit or one day after the last working day of the visit.

**Travel costs of the accompanying person will not be reimbursed,** if travel is planned two or more days earlier than the first working day of the Preparatory Visit, and return travel is planned two or more days later than the last working day of the Preparatory Visit. The Operator will not admit 50% reimbursement in case when one part of travel takes place during the eligibility period, and the second part - outside the eligibility period.

**Insurance costs of the accompanying person**

The accompanying person may purchase insurance for the period of the Preparatory Visit and time for travel. The eligible costs in this category are:

- personal accident insurance enabling unexpected return home e.g. in case of illness; and
- insurance for the civil liability covering any potential damage that the Individual Participant may cause during the project.

The insurance costs will be reimbursed on the basis of actual incurred costs after the approval of the Completion Report. Upon the request of the Operator, the Project Promoter is obliged to submit the original insurance document of the accompanying person along with the Completion Report. If purchase cost is not shown on the insurance document, it should be accompanied by the appropriate accounting document/proof of payment. Maximum limit for travel and insurance costs should not exceed 500 euro. Should this limit be exceeded by the accompanying person, the difference shall be paid from the Project Promoter’s own funds.
Additional insurance (extended liability insurance) that covers also health care/medical treatment costs in the host country is not eligible. The Operator will recognize health care/medical treatment costs only if it is an integral element of the basic insurance package. Other costs which result from extending the insurance liability to additional elements (e.g. luggage insurance, extreme sports) shall be recognized as ineligible.

The whole insurance cost shall be recognized as ineligible, if:

- the insurance will cover a longer period than the eligibility period mentioned in the Financial Agreement with the Operator, including the allowed time for travel;
- Project Promoter purchased the extended insurance liability which is different from the one described above as eligible;
- it is not possible to determine and/or divide the particular elements of the insurance package.

**Costs of local guardian**

These costs will be reimbursed on the basis of a receipt or statement of will of the local guardian. Receipt should be understood as a document:

- issued by the institution specialized in providing care for people with disabilities, or
- statement of will of the Individual Participant and the local guardian who confirm that appropriate salary was paid for entrusting the Individual participant to the keeping of the accompanying person; the statement should also mention the period of care (from-to).

**Costs of special tutoring material**

These costs will be reimbursed upon receipt/ bill of sale.

**Costs of medical treatment**

These costs will be reimbursed upon receipt/ bill of sale.

**Costs of special insurance**

These costs will be reimbursed upon receipt/ bill of sale.

**Other costs**

These costs will be reimbursed upon receipt/ bill of sale.

**Ineligible costs, other than the abovementioned, are:**

- additional fees added to payments (e.g. for payments made by credit card, service fee for ticket purchase, manipulation fee),
- goods and service tax and other taxes (e.g. VAT costs, if the Project Promoter can recover it) and other expenses which by law can be recovered,
- fines, financial penalties and the court costs,
- paying back the credit, loans, losses,
- expenses financed by other sources,
- non-evidenced expenses.

**4.3. Payments**

All payments will be transferred by the Operator to the bank account of the Project Promoter as given in the grant agreement. After receiving the payment, the Project Promoter should immediately transfer the funds to the Individual Participant.

- the advance payment representing maximum 80% of the grant awarded will be made after the signature of the Financial Agreement,
the final balancing payment (not exceeding, however, 20% of the grant awarded) will be transferred after the approval of the Completion Report on project implementation by the Operator. The following documents will be taken into account while calculating the final payment amount: Completion Report and annexes e.g. receipts for tickets’ purchase, tickets, boarding passes or invoices documenting the additional costs of the Individual Participant related to disability - in case of projects where the Operator will request for sending additional documents for financial clearance;

- payments will be transferred to the Project Promoter’s account in national currency of the Project Promoter from the Programme Operator’s account held in PLN.

5. APPLYING PROCEDURE

Application form should be submitted to the Operator at least 8 weeks prior to the planned date of the Preparatory Visit.

Call for proposals is due from 10th January to 11th March 2013. Final deadline for applications refers to both electronic applications submitted in the on-line system and printed and signed documentation delivered to the Operator’s office (the date on the postmark or the proof of dispatch from the courier service will be decisive). Electronic application forms may be submitted on-line until 16.00 hours. After that hour the on-line system will be closed for applications.

Applicants from the Donor States must complete the application form in English. Application form must be completed in the online application generator available at online.frse.org.pl. Applicants should subsequently print out, sign and stamp the application form and deliver it along with necessary enclosures in one envelope or package, via registered mail (the date on the postmark is decisive) or courier/messenger service (proof of dispatch from the courier service is decisive), or personally, in 2 originals to the Operator:

Foundation for the Development of the Education System (FRSE)
Scholarship and Training Fund
ul. Mokotowska 43
00-551 Warsaw, Poland
with the inscription: Preparatory Visits

All applications will undergo formal and quality assessment as they come, on the on-going basis. Both formal and quality (content-related) assessment will be performed by the Scholarship and Training Fund staff. All applications, which will pass formal assessment and will be positively evaluated in the quality assessment, will be co-financed, provided the funding is still available. The date of application delivery to the Operator’s office will be decisive in the process of awarding the grant. For applications sent by post, the date on the postmark or the proof of dispatch from the courier service will be taken as the submission date.

This Call for proposals is particularly addressed to individuals and institutions which plan to implement their projects with partner institution from Poland within one of the following measures:

- Mobility Projects;
- Inter-institutional Cooperation;
- Development of Polish Higher Education Institutions;

However, the institutions which plan a prospective cooperation within the frame of a different programme, eg. one of the components of the Lifelong Learning Programme http://www.llp.org.pl/, are not excluded from the call.
The deadline for the submission of applications is not negotiable for applicants. Applications submitted after the deadline set forth in the Call for proposals will not be considered. Neither the applications submitted under the Call for proposals, nor the accompanying attachments will be returned.

5.1. Deadline for submission of application forms
Applications will be received from 10th January to 11th March 2013 at the latest.

<table>
<thead>
<tr>
<th>No.</th>
<th>Application deadline</th>
<th>Period covered by the grant</th>
<th>Duration of the Preparatory Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>January 10th - March 11th, 2013</td>
<td>from March 7th to June 30th, 2013</td>
<td>Up to 5 working days + max. 2 days for travel</td>
</tr>
</tbody>
</table>

Attention: Timeline of the Preparatory Visit should be planned at least 8 weeks prior to the submission of the application form. For example, if start of the visit is planned for 4th April 2013, the application form should be submitted until 7th February 2013 at the latest. Should the visit be planned within a shorter period than 8 weeks after submitting the application form, the application will be rejected as not meeting formal criteria.

5.2. Application form

Before filling in the application form, the applicants should read this Guide carefully. Applications should be completed only in the online system available at: online.frse.org.pl.

The Applicant should make sure that (s)he submits the final printed version of the application without the water mark “SZKIC” (DRAFT). Applications completed on inappropriate forms will be rejected as formally ineligible.

Applicants are not allowed to modify the form - any way of modification (e.g. any handwritten completion / supplementing / making strikeouts in the application form) is unacceptable and will give ground to reject the application form as ineligible. This rule does not refer to fields/ blanks in the application form where, according to the instruction, the applicant must fill it in by hand (e.g. field for handwritten signature).

Polish applicants should complete the application form in Polish, and a part of the application form in the content-related section must be completed in English. Applicants from the Donor States should complete the application form in English. Information given in Polish and English sections of the application forms should be coherent.

Content-related part of the application form should be logical, clear and coherent, timeline of the visit should be realistic, and described explicitly and in detail.

Before submitting their application, Applicants should check it themselves with regard to the scope, quality, coherence and completeness of the information contained therein, and make sure that the annexes are complete; the Checklist included in the application form will be useful for this purpose.

5.3. Signature of the legal representative(s) of the Applicant

The application form should be signed by the legal representative(s) of the Applicant, according to appropriate document confirming the form of legal representation, e.g. statute/byelaw, exempt
from the National Court Register or excerpt from appropriate business activity/private enterprise register, or excerpt from other analogical registers depending on the legal type of the Applying institution. Should the application form be signed by another person than the legal representative of the Applicant, the appropriate letter of authority to represent the Project Promoter during the Preparatory Visit implementation should be sent along with the application form.

Due to the rules of the Call for proposals and the ongoing assessment procedure, the Operator will not accept copies, faxes or scans of the attachments which will not be certified for originality by the authorized person, e.g. attorney, notary public, legal counsel, legal representative of the applying institution, other person authorized by the legal representative of the applying institution.

5.4. Annexes to the application

The application should be accompanied by the following annexes in original or copies certified for originality:

- CV of the Applicant in the Europass format (document available at the following website http://europass.frse.org.pl/europass-cv;
- original document and 1 copy of the letter of intent from the Host Institution confirming its willingness to facilitate the implementation of tasks stipulated in the application form;
- original document and 1 copy of the recommendation letter for the Individual Participant from the Home Institution signed by the immediate supervisor/academic tutor of the Individual Participant;
- excerpt from the appropriate register (e.g. National Court Register) in case of legal entities or excerpt from other analogical registers including information on legal representation of the Applicant (original or copy certified for originality by the authorized person);
- in case of natural persons with registered business activity, excerpt from appropriate business activity/private enterprise register, accompanied by documents including information on conferring the Taxpayer Identification Number (if applicable);
- correct and complete declaration on de minimis public help (along with the attachment, if applicable) - original or copy;
- in case of request for additional costs related to special needs of the Individual Participant - a valid (not older than 3 months) letter of confirmation on the disability level/type from social security institution is required (expiry date of the document should follow after the date of the planned Preparatory Visit);
- should the application form be signed by another person than the legal representative of the Applicant, the appropriate letter of authority (original) should be sent along with the application.

Documents certified for originality which the Operator finds acceptable are described in point 5.3 of this Guide. The possibility of submitting copies of attachments does not refer to these enclosures where it is clearly indicated that they should be send in the original form.


Content of both letters accounts for important element of the quality assessment. The Operator does not impose any template of the recommendation and intent letter. A letter of recommendation, as well as letter of intent should contain trademark of a given institution and be signed by a person who wrote it out. The signature should be readable, thus enabling to identify the signatory.
Letter of intent and recommendation letter should contain at least the following information:

- contact data of the institution which issued a letter;
- short description of the institution and its role in the project;
- reasons explaining why the Individual Participant is recommended (recommendation letter);
- willingness to host the Individual Participant during the planned visit with indication of the exact dates when the visit should take place (letter of intent);
- information about the history of current cooperation between Home and Host institution and/or information about previous cooperation between both institutions;
- description of the timeline of the planned visit;
- city/town and date (date should be actual);
- signature of the direct supervisor or academic tutor of the Individual Participant (recommendation letter) and signature of the contact person/tutor or legal representative of the Host institution (letter of intent).

Letters are subject to the evaluation of the project proposal, their content should be coherent with the project proposal. Quality and content of recommendation and intent letters will influence the final score and eventual co-financing of the project proposal.

6. APPLICATION ASSESSMENT AND SELECTION PROCESS

The Operator is responsible for the selection of the submitted project proposals. Each application for a co-financing will be registered and given a reference number, whereupon the Operator will check if the application meets formal and quality (content-related) criteria. Only applications which fulfill formal eligibility criteria will be subject to quality (content-related) assessment. Decision on formal acceptance might be taken after first eligibility check, in cases where shortcomings are identified, the Operator might call in the Applicant to supplement the application or reject the project proposal without the possibility of supplementing additional documentation.

6.1. Application assessment schedule

The selection schedule for submitted applications is outlined in the schematic table below.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time frame</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration and formal and eligibility check of applications</td>
<td>Carried out on the on-going basis as applications are submitted. It should be completed at the latest 2 weeks after receiving the original paper version of the application form by the Operator</td>
<td>Operator</td>
</tr>
<tr>
<td>Informing Applicants about the receipt of applications and the possibility to make up minor formal deficiencies</td>
<td>Carried out on the on-going basis as applications are submitted. It should be completed at the latest 2 weeks after receiving the original paper version of the application form by the Operator</td>
<td>Operator</td>
</tr>
<tr>
<td>Making up minor deficiencies in applications (only with regard to formal and eligibility check)</td>
<td>Not later than 3 days after the receipt of the request from the Operator</td>
<td>Applicant</td>
</tr>
<tr>
<td>Content-related (quality) assessment</td>
<td>Carried out on the on-going basis for application that meet formal and eligibility criteria</td>
<td>Operator</td>
</tr>
<tr>
<td>Decision to approve/ reject application, preparing and making public lists with information on co-financed projects</td>
<td>Serial meetings of the FDES Management Board - frequency depends on the amount of applications which passed content-related (quality) assessment</td>
<td>Operator</td>
</tr>
<tr>
<td>Informing Applicants about</td>
<td>About 5 weeks after receiving the original</td>
<td>Operator</td>
</tr>
<tr>
<td>Activity</td>
<td>Time frame</td>
<td>Responsible</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>selection results</td>
<td>paper version of the application form by the Operator</td>
<td></td>
</tr>
</tbody>
</table>

The timeline of applications’ selection procedure will be in accordance with the Regulations of the Ministry of Regional Development regarding the selection procedure of project proposals. The publication of selection results is followed by a period during which the Operator will sign agreements with the Applicants whose projects have been selected for co-financing.

6.2. Formal and eligibility check

Each application will undergo formal and eligibility check according to the following criteria:

- Applying institution is eligible to apply for funding under the Scholarship and Training Fund within Preparatory Visits;
- Application has been completed in the online system;
- Project proposal has been submitted using the proper application template;
- Polish and English parts of the project proposal are coherent (for applications submitted by Polish applicants);
- Application has been submitted in compliance with the timing published in the Call for Proposals;
- Application is complete (all compulsory parts have been completed);
- Application is signed by the legal representative or other legally authorised person from the Applying institution;
- Duration of the visit is in compliance with the timing published in Call for Proposals;
- Application has been submitted at least 8 weeks before the beginning of the planned visit;
- Schedule of the visit was planned in efficient way which means that days of actual activities are not separated by days without such activities (e.g. by Saturday and/or Sunday);
- Applying institution confirms that the Individual Participant is competent in the use of English language to a minimum of level of B2;
- Application has been submitted in printed version in two originals;
- All required annexes are attached to the application form;
- Applying institution has fulfilled earlier obligations arising from any previous agreements concluded with the Foundation for the Development of the Education System.

The Operator will check, if all required annexes are attached to the application form (see article 5.4 Annexes to the application of this Guide).

Where specific minor formal shortcomings are identified, the Operator will request the Applicant to make up deficiencies in the application form. Only the following errors may be corrected and documents to be supplemented:

- confirmation of sending the application in compliance with the timing published in the Call for Proposals (if date of the postmark is not readable);
- part of a supplement eg. one of the pages of de minimis public help (the following does not refer to pages containing the original signatures);
- certifying copies of documents for originality.

It will not be possible to provide any attachment in full, if this is missing in the application form.
The communication about shortcomings will be sent to the contact person of the Applicant concerned by electronic mail, therefore the Applicant should make sure that the e-mail address given in the application form is active and up-to-date. Documents should be supplemented within the impassable deadline of 3 working days from the date of receipt of the request from the Operator.

Results of the formal and eligibility check will be published on the website at www.fss.org.pl on an on-going basis, the first information about formal and eligibility check will appear not later than two weeks after the receipt of the first application forms by the Operator.

Applications fulfilling the eligibility criteria will be forwarded for content-related (quality) assessment.

Formal and Eligibility Form is available at www.fss.org.pl – see bookmark Preparatory Visits, in documents of the Call.

6.3. Content-related (quality) assessment

Content-related (quality) assessment of submitted applications is carried out by the STF staff (two people).

The following elements will be taken into account in content-related (quality) assessment:

- purpose of the Preparatory Visit;
- schedule of activities undertaken during the visit;
- influence of the visit on the future activity of the Applying institution and the concept of cooperation with the hosting institution;
- qualifications and professional experience of the Individual Participant;
- the quality and accuracy of the letter of intent and recommendation letter.

Quality Assessment Form, along with the scoring, is available at www.fss.org.pl – see bookmark Preparatory Visits, in documents of the Call.

Co-funding will be awarded, as long as funding is available, to all projects with scoring of at least 29 points (60%).

During the assessment procedure, the Operator will check whether the budget of the visit was adequately calculated. Should the assessment reveal any errors in the amount of requested co-financing, and provided that in due the quality assessment the proposal receives a score that will allow for its financing, the Applicant will be offered to sign the agreement with a cut down budget where corrections of financial errors are included.

6.4. Appeal procedure

Applicants may appeal against the results of both the formal and eligibility check and quality check. The appeal procedure is two-instance. The appeal body of lower instance is the Operator. The higher appeal instance is the National Focal Point. No appeal may be lodged against the final decision of the Operator regarding the awarded funding.

After the exhaustion of the appeal track described in the procedure of assessment and selection of submitted project proposals (from the results of formal and eligibility check and/or quality check), no re-appeal from the Operator’s decision will be possible.

By submitting their application, Applicants accept the rules of the Scholarship and Training Fund and rules of the Call for proposals, with the rule of the competitiveness of projects in particular.
7. PROJECT IMPLEMENTATION

7.1. Conclusion of the agreement

The Applicant will be informed about the results of the selection procedure by e-mail and traditional mail.

Following the decision of the FDES Management Board, financial agreements for the implementation of projects are signed with the Applicants. The agreement specifies in detail the obligations of the parties, the conditions for the transfer of payments and the requirements for reporting and accounting for the awarded co-financing. The bilateral financial agreement is drawn up by the Operator in two originals, one for each of the parties.

Attention: Before signing the agreement, the Applicants representing the non-public sector will be asked to submit actual (i.e. not older than 3 months) statements from the social security institution and tax office in original, or copy certified for originality, declaring that there are no defaulting payments in taxes and subscriptions. As these documents are issued after some time, the Applicant should ask the appropriate institution for issuance in advance eg. when the project proposal is submitted.

The Operator may request additional documents and information from the Applicant, if these are indispensable for signing the Financial agreement.

The Operator reserves the right to refuse to sign an agreement with the Applicant in the following cases:

- the Applicant has submitted documents which are forged or altered, or contain untrue information;
- the Applicant has refused to provide the required documents;
- the Applicant has not fulfilled the requirements arising from any previous agreements concluded with the Foundation for the Development of the Education System.

7.2. Eligibility period

The eligibility period for expenses is determined in the Financial agreement with the Project Promoter depending on the schedule given in the application form.

- the beginning date of the eligibility period - the beginning date of the eligibility of costs given in the financial agreement: in case of Preparatory Visits this will be the date of the FDES Management Board decision on awarding the co-financing. The Project Promoter may bear project costs related with tickets’ purchase beginning from that date.

Attention: The earlier bought tickets will be recognized as project legible costs provided that the dates of travel will be in accordance with the information given in the application form and the Financial agreement.

- the end date of the eligibility period - the last day of the eligibility of costs as determined by the agreement: in case of Preparatory Visits this will be the date of submitting the Completion Report, but no later than within 10 working days after finishing the project implementation/return journey to home country.

All the activities performed and all the expenses incurred out of the eligibility period given in the Financial agreement will be considered as not related to the project and hence ineligible.
7.3. Rules of reporting and financial clearance of the awarded co-financing

According to the Financial agreement each Project Promoter is required to submit the Completion Report, together with a request for the final payment not later than 10 working days after the end of the **Preparatory Visit**. The exact date of submission of the Completion Report will be specified in the Financial agreement.

Reports should be drawn up in the online system [http://online.frse.org.pl](http://online.frse.org.pl) using template prepared by the Operator which are published on the website at [www.fss.org.pl](http://www.fss.org.pl), and then sent to the Operator in an electronic and paper form.

The **Completion Report** consists of a content-related and financial part, and along with the attachments will be the basis for final clearance of the **Preparatory Visit’s costs**.

The content-related part of the report includes a description of implemented activities, with a special focus on the accomplished results of the visit.

The financial part of the report contains a detailed statement of expenses in relation to the approved budget of the project and serves for determination of the amount of balance payment, which is paid to the Project Promoter (institution) after the acceptance of the Completion Report by the Operator.

All amounts in the Completion Report should be declared in PLN, the currency exchange rate from EUR to PLN will be given by the Operator after transferring the first advance payment. In case of costs incurred in other currencies that the abovementioned, the Project Promoter should use the currency exchange rate to PLN published by the European Commission as per the day of transfer of the advance payment to the Project Promoter’s account: [http://ec.europa.eu/budget/inforeuro/index.cfm?fuseaction=home&SearchField=&Period=2009-2013&Delim=&Language=en](http://ec.europa.eu/budget/inforeuro/index.cfm?fuseaction=home&SearchField=&Period=2009-2013&Delim=&Language=en)

Currency exchange rates and exchange rate losses are not eligible costs in the project.

Obligatory attachments to the Completion Report:

- **Certificate of attendance** including information on the actual start and end dates of the visit (see: **Attachment No. 1** to this Guide) which will allow for calculating the final lump sum for subsistence costs.

The Project Promoter is required to use the grant provided in accordance with the Scholarship and Training Fund rules, the purpose for which it has been awarded and the conditions laid down in the agreement.

A grant is accounted for on the basis of accounting documents which, in accordance with the Accounting Act of 29 September 1994 (Journal of Law of 2002 no. 76, item 694, as amended by subsequent legislation), are proof that a business operation has been carried out.

The following documents are proof of eligible expenditure and may be included in a list of invoices and other accounting documents of equivalent probative value:

- tickets, boarding passes;
- VAT invoices;
- correcting invoices;
- bills;
- receipts;
- insurance policies.

All documents on expenses presented for the financial clearance should be paid in full within the period of the eligibility of costs.
All financial documents should be properly described by the Project Promoter, i.e. the description should include information about the amount and currency given in the financial document, source of financing, number of the financial agreement and purpose of purchase.

Transfer of the unconsumed co-financing from one budget category another is not possible, e.g., unconsumed grant for travel and insurance may not be transferred to finance subsistence costs. Unconsumed part of the grant will be taken into account whilst calculating the amount of the balance payment after the acceptance of the Completion Report by the Operator.

The Operator may decide to execute additional financial check before calculating the final amount of the balancing payment and final closure of the financial agreement. In such case, the Project Promoter might be asked, upon a separate letter of request, to submit the originals of financial documents (source documents and proofs of payments) which confirm payments declared in the Completion Report.

After the analysis of submitted documents and calculating the final amount of grant co-financing, the Operator will transfer the balance payment or issue the request for reimbursement.

The Operator might request the Project Promoter to submit the originals of the following documents which evidence the incurred payments of:

- travel and insurance costs: invoices, receipts, tickets, boarding cards, insurance policies etc.
- additional costs related to the special needs of the Individual Participant: invoices, receipts, bills, tickets, boarding cards and certificate of attendance of the accompanying person etc.

After completion of the additional financial check procedure, the originals of the financial documents will be returned to the Project Promoter along with the project closure letter.

**7.4. Uncompleted projects and termination of the agreement**

Should the Project Promoter abandon the project before the end of the period foreseen for its implementation, they are obliged to immediately inform the Operator thereof and provide justification for their decision in writing. The Operator will determine the amount of the grant to be reimbursed, depending on the results achieved and the objectives of the project concerned.

**8. ADDITIONAL INFORMATION**

**8.1. Public aid**

A declaration from the Applicant on the public aid received is an integral part of the application form. Providing support and implementing projects within the framework of the Financial Mechanism of the European Economic Area and the Norwegian Financial Mechanism require that regulations underlying public aid be applied where the Applicant is an entity exercising economic activity (however, one should bear in mind that economic activity is defined broadly in the Community legislation and understood as any activity where goods and services are offered on a given market, regardless of whether this activity is or is not intended to generate profit).

In accordance with Article 87 (1) of the Treaty establishing the European Community, support for entities exercising economic activity is subject to the regulations on public aid if the following conditions are fulfilled simultaneously:

1) it is provided by the State or from public funds;
2) the entity gains benefit under more favourable conditions than those offered on the market;
3) it is selective (favouring certain entities or the production of certain goods);
4) threatens to distort or distorts competition and affects trade between EU Member States.

Where fulfilling all of the above-mentioned conditions, a grant for the Applicant exercising economic activity will be considered public aid and may be awarded as de minimis aid, provided that, together with any other de minimis aid received during the last three tax years from various sources and in various forms, it will not exceed a gross amount of 200 000 EUR, taking into account Article 63 of the Act of 30 April 2004 on proceedings in public aid cases (Journal of Law no. 123, item 1291, as amended by subsequent legislation).

All Applicants, including those who have not received such aid and entities not engaged in economic activity (regardless of their legal form), are required to submit to the FDES a declaration on de minimis aid received during the present reporting period and two preceding reporting periods before the date of the submission of the application for a grant.

9. PROJECT MONITORING AND AUDITING

9.1. Monitoring and audit

One of the main tasks of the Operator is to monitor projects implemented by Project Promoters. This involves collecting, reporting and interpreting on a regular basis data which describe the progress and outcomes of implemented projects. In order to monitor the implementation of projects supported within Preparatory Visits, the Operator may use on-desk monitoring i.e. analysis of financial and content-related reports submitted by Project Promoters.

Project Promoter is obliged to provide all necessary explanation and present all documents which refer to the project co-financed under the Scholarship and Training Fund to the financial and content-related check on every demand of the Operator.

9.2. Record keeping

The Project Promoter is required to keep all documents related to the implementation of the project by 31 December 2020.

10. INFORMATION AND PUBLICITY

In connection with the receipt of a grant from the STF, the Project Promoter is required to acknowledge the support received in all documents related to the visit and any material related to, or produced as a result of the visit (eg. training materials, brochures, leaflets, posters). This is intended to make recipients of implemented projects aware that funding for projects in which they participate is provided by the Scholarship and Training Fund established under the EEA Financial Mechanism and the Norwegian Financial Mechanism.

All activities should be accompanied by the following information:

“Supported by the EEA Grants and Norway Grants within the framework of the Scholarship and Training Fund”.


11. CONTACT WITH THE STF OFFICE

Interested individuals and Applicants may obtain information on how to apply for grants under the Scholarship and Training Fund by phone from Monday to Friday between 9 a.m. and 4 p.m.
Information may also be obtained in writing or directly at the Operator's office by prior arrangement:

Foundation for the Development of the Education System  
Scholarship and Training Fund  
ul. Mokotowska 43  
00-551 Warsaw  
tel. +48 22 46 31 470  
fax. +48 22 46 31 028

Consultation may not involve advice on an individual basis as regards the quality content of an application.

Contact information for Preparatory Visits

Magdalena Gessel  
magdalena.gessel@frse.org.pl  
tel. +48 22 46 31 472

List of attachments:

Attachment No. 1: Certificate of Attendance  
Attachment No. 2: Clearing of Travel Costs (Vehicle Card)
CERTIFICATE OF ATTENDANCE

This is to certify that

Ms/Mrs/Mr

has performed Preparatory Visit under Scholarship and Training Fund.

The visit was held in:

Name of the Host Institution

located in: City and country

The first working day of the visit was on: dd/mm/yyyy

the last working day of the visit was on: dd/mm/yyyy

Name and surname of the representative of the Host Institution

Signature of the representative of the Host Institution: (must be readable)

stamp of the Host Institution: date: dd/mm/yyyy
CLEARING OF TRAVEL COSTS
Rozliczenie kosztów podróży samochodem

IMIĘ I NAZWISKO: .................................................................
Name and surname

CEL PRZEJAZDU: .................................................................
Travel purpose

TRASA PRZEJAZDU: .............................................................
Travel route

DZIEŃ I CZAS WYJAZDU: .....................................................
Day and time of departure

DZIEŃ I CZAS POWROTU: ...................................................
Day and time of arrival

RODZAJ TRANSPORTU: .......................................................  
Means of transport

NUMER REJESTRACYJNY: ....................................................  
Car registration number

MARKA I TYP SAMOCHODU: ..............................................  
Brand and type of car

POJEMNOŚĆ SILNIKA: .........................................................  
Engine volume

WŁAŚCICIEL POJAZDU: .......................................................  
Name of the car’s owner

RODZAJ PALIWA: ...............................................................  
Type of fuel (gas, oil etc.)

STAN LICZNIKA- WYJAZD: ................................................  
Kilometres on car meter upon departure

STAN LICZNIKA- PRZYJAZD: ..............................................  
Kilometres on car meter upon arrival

ILOŚĆ PRZEJECHANYCH KILOMETRÓW: ..............................  
Distance in km

KOSZT PRZEJAZDU: ..............................................................  
Travel costs

SŁOWNIE: ...........................................................................  
In written:

podpis (czytelny)
signature (readable):