

# Consultancy services

## to your H2020 proposals and projects

Proposal Development

Project Management

Financial Reporting

## Consultancy services

### How to fit a project idea to a call?

In many cases, you might have an excellent project idea and still, you might have difficulties with finding the perfect call to develop a project. Whether you target a bottom-up or a top-down type of call, you should consider any requirement set down in the text. Particularly when you target a top-down topic in an H2020 work programme, the approach you must follow is to make sure your project idea is perfectly aligned with the topic text. Keep this mind and then decide if your idea can be tailored in a way that it complies both with the work programme topic objectives and your original scopes. The answer is not always obvious. We know how to read your concept and how to read the work programme topic and can support you in selecting the right approach, the right topic as well as give recommendations on how to change/adapt your project idea for a selected open call.

### Proposal writing

Each project proposal and consortium is unique. Depending on the call, the complexity of the project, the experience of the partners, etc. the level of the support you might need from a consultant can vary a lot. From an every-day intensive support and being involved in all little steps till having a call two-three times to see if you are on the right track – all is possible – as you need.

What might those steps be?

1. Information about the Programme and its practicalities including the financial rules
2. Ensuring full alignment between project idea and call for proposal
3. Selecting the appropriate partners to your consortium
4. Developing the project structure including the:
  - o full project concept;
  - o objectives;
  - o work packages;
  - o time schedule;
  - o allocation of tasks between the partners and work packages.
5. Explaining the requirements of the proposal form in terms of content, evaluation criteria, documentation and other relevant information (e.g. statistics, graphs, etc.)
6. Setting up the adequate project management structure
7. Developing the project budget (and its distribution between work packages) in cooperation with all consortium partners.
8. Finalising professional content of the proposal (considering all information provided by the Client and the partners of the Project)
9. As a final step, checking the completed administrative forms before the submission.

*Please note:*

The Consultant will not develop the scientific content of the project proposal. The subject of the assignment is to support the Client with developing the project concept, its structure, objectives, budget, work packages, management and filling in the administrative forms and giving recommendations on the technical content considering the perspective of the evaluators and the European Commission.

### **Pre-evaluation of proposals**

One of the most useful things to do before the submission of the proposal is to give the draft version to another expert who was not involved in the proposal preparation and ask him/her to evaluate the proposal with the same process that the external evaluators will follow when receiving your proposal. 3 hours, not more – the feedback is extremely valuable and will improve your proposal considerably. The evaluation process in EU projects looks as follows

The main stages of project selection are:

- Receipt of proposals and sending an **acknowledgement of receipt**
- Verification of **eligibility of proposals from an administrative point of view** (date of submission, presence of all the forms, transnational character of the project, etc.)
- **Individual evaluation** of eligible proposals by external experts, considering the socio-economic and, where appropriate, the ethical aspects of the proposal
- The evaluators discuss the proposals and agree on the common scores
- **The final ranking of the proposals is done and the evaluation summary reports are prepared and sent to the applicants**

Our expert evaluators will:

- Fill in the individual evaluation report of the specific call where your proposal is intended to be submitted (3 hours)
- Provide you with detailed comments on how to improve the proposal (as needed)

### **Preparation for the kick-off meeting**

The first steps in the project implementation are crucial. The kick-off meeting is an important first test for the consortium and the project to pass. All coordinators should allocate enough time and effort to properly organise and implement this meeting and the launching phase of their projects. Our experts can provide special assistance in this starting period by:

- Setting up the management system including administration and communication procedures your project needs
- Supporting you in the organisation of the kick-off meeting and providing a lecture/training to your partners on their financial and administrative tasks and responsibilities

- Giving advice in the Grant Agreement preparation and Consortium Agreement preparation

### **Train your partners**

No project works as per the initial plan. Therefore, successful project management is a process of continuous planning and revising. Nothing is certain, but proper planning can help avoid many mistakes. This planning includes understanding which partner in the consortium needs regular, continuous or occasional type of support and which needs training on the rules and requirements of the EU programme from which your project won co-financing.

The training and the support we give to our project partners cover:

- written guidelines on the rules – tailored to the specific project with detailed instructions
- templates to be used, examples and calculation tables
- face-to-face meeting with all partners or selected partners to discuss administrative and financial rules of the programme and their responsibilities - when they have to do what and how in their organisation to comply with these rules
- answering specific questions, solving special problems

Would your partners need similar support or training, we can help and guide you how to provide it.

### **Financial Reporting – project support**

Financial management is our speciality and the backbone for many project managers. The project specific support refers to the following tasks:

- Monitoring the budget spending of the partners
- Instruct and support the project partners in preparing and delivering the financial reports with adequate justification
- Explanations and justifications should be developed and included in the periodic report – we give guidance on what and how to include in the report
- Support in finding solutions to potential financial problems coming up at the reporting phase
- Help in understanding and filling in the electronic reporting sections on the Participant Portal

### **Financial Reporting – organisational support**

All the organisations participating in an EU project must have adequate financial and administrative capacities to manage their part of work. This includes procedures, policies and processes to be set up (proper accounting software and accounting procedures, travel policy, bonus policy, hiring policy, value for money selection procedures for subcontractors, and much more ...) and tailored to the EU project administration.

- Do you have these set up?
- Do they support the proper administration of an EU project?
- Do you know when the organisational, national, programme or EU rules prevail?
- Did you face difficulties with the EC reporting?
- Did the EC reject some of your costs reported?

Have your system checked before getting involved in the project or before you submit your reports. We can make your life easier, your system safer.

### Mock audit

EC financial audits at FP7/H2020 beneficiaries can be conducted directly by the European Commission services or by external contractors. Do you know how the financial audits are conducted and how to get prepared for both approaches? We do, because we have experienced both and more importantly, survived both. Using our experience, we helped others to survive the EC financial audits or decreasing the negative outcome.

In our mock audit, our financial expert will check all financial data and your system on several projects. This can take place after the official EU financial audit, whose findings determined that you 1) must correct your system and procedures 2) comment on the draft audit report 3) try to avoid negative consequences. What we recommend is to have our financial audit conducted on your projects before the EC representatives visit you and 1) avoid a negative official EC audit 2) correct and/or improve your financial, admin management system 3) submit adjustments to your financial reports if needed.

Our experts will **simulate a pilot-scale EC financial audit** for one or more of your FP7/H2020 projects, in which your organisation is involved as a beneficiary. The goal of this exercise is **to verify the compliance of the administrative and financial procedures** at your organisation with the requirements of the Grant Agreements of your project(s) funded under FP7 and/or Horizon 2020, and **propose recommendations for improvement**, if necessary.

To this aim, financial statements of one or more projects of your choice for their **closed periods will be analysed** with a view to verifying the eligibility of the costs claimed. Bookkeeping and timekeeping procedures will be carefully checked with special attention to potential systematic errors.

Budapest, 4<sup>th</sup> of January 2019