

# European Funding Academy

5-8 February 2019

Vienna

# Horizon 2020 Proposal Development Training Course – *Focus: Impact*

## AGENDA

## DAY 1

08:30 – 09:00  
09:00 – 09:15

**Registration**  
**Event opening and introduction to the course**

09:15 – 10:00

**Introduction to Proposal Development under H2020**

- Work programmes, calls and topics – budgets, deadlines, submission processes
- General principles and features of H2020 proposals – understanding and fitting appropriately to the EU R&I context
- Types of actions (RIA, IA, CSA) and TRLs – positioning your proposal effectively
- First steps of proposal preparation: Identifying the right call, Call analysis, proposal abstract, background research, consortium building

***Interactive exercise:** Conceiving potential activities for a real H2020 WP topic open for RIA, IA and CSA action types.*

(10:00 – 10:15 Coffee Break)

10:15 – 11:15

**From idea to H2020 proposal – A hands-on approach**

- How to turn your novel idea into a winning concept
- Drafting the Part B of the proposal – From call analysis to submission
- Proposal writing section-by-section – Examples, tips and templates from section 1.1. until 5.2 of the Part B of the proposal with lessons learned from evaluations

(11:15 – 11:30 Coffee break)

11:30 – 12:30

**Expected Impact in H2020 Proposals**

- Impact in H2020 proposals – examples of different approaches to addressing the “Expected Impact” of your proposals, lessons learned from evaluations
- Impact in RIAs, IAs and CSAs – how to position your innovation from RTD to market uptake, Dos and Don'ts
- Impact indicators and Impact assessment methodologies
- Barriers to achieving the Expected Impact – Types of barriers, Barriers vs. Risks

(12:30 – 13:30 Lunch)

13:30 – 16:00

**Proposal Development Workshop: Call analysis and Expected impact**

Participants are divided into small groups to practice the first steps of impact development under Horizon 2020: Call analysis – to understand the EC requirements and based on the received project concept, project objectives and a preliminary work plan, the participants will have to identify

- How the project will contribute to each of the expected impacts mentioned in the call
- Substantial impacts not mentioned in the work programme (RIA,IA)
- Barriers - how to differentiate barriers and risks

(14:45 – 15:00 Coffee break)

# Horizon 2020 Proposal Development Training Course – *Focus: Impact*

## AGENDA

## DAY 2

**09:00 – 10:00**

### **Impact, Innovation and Exploitation in H2020 proposals**

- How to identify and select the best exploitation, IP and innovation strategy to maximise the potential impact of your H2020 project
- Business plans, market uptake strategies
- Exploitation and sustainability – examples of project and partner level approaches and routes
- Pre-proposal and proposal-stage agreements and tools for consortia

(10:00 – 10:15 Coffee Break)

**10:15 – 11:00**

### **Dissemination & Communication in H2020 proposals**

- How to tailor an effective dissemination and communication plan to maximise the potential impact of your H2020 project
- Tools, measures, strategies and channels to reach your target group and communicate the right message in the right way
- Requirements of the EC, legal obligations according to the H2020 GA
- Knowledge management, Open Access, Open Data
- Dissemination and communication under Ethics and IPR issues

**11:15 – 12:30**

### **Proposal Development Workshop: Dissemination and Communication**

Participants will define the relevant target groups and the most appropriate dissemination and communication tools, channels and strategies for disseminating and communicating the results of the project with a view to maximizing its impact.

(12:30 – 13:30 Lunch break)

**13:30 – 14:30**

### **Proposal Development Workshop: Exploitation**

Participants will continue the work in small groups to draft the Expected Impact section and identify the best scenario for exploitation and IP strategy:

- Exploitable results and the potential exploitation strategies – how to transform this into a “plan”
- Draft strategy for knowledge management and protection strategy

(14:30 – 14:45 Coffee break)

**14:45 – 15:45**

**Proposal Development Workshop: Finalising and submitting the proposal**

Participants will identify the efforts and resources to be committed to define a sound budget. By introducing a real proposal, the evaluation summary report, and focussing on the comments on the Impact section, the participants will have a better understanding of the evaluators' perspective.

**15:45**

**Wrap-up and end of course**

# Horizon 2020 Project Management and Financial Reporting

## AGENDA

### DAY 3

- 08:30 – 09:00**      **Registration**
- 09:00 – 09:30**      **Event opening**
- 09:30 – 10:30**      **How to Coordinate and Manage your R&I Project?**
- Essential project management and coordination tools and tips. Dealing with the partners. Motivation and Controlling tools. Legal and administrative obligations. Possible administrative and technical bottlenecks, legal problems.
- (10:30 – 10:45 Coffee break)
- 10:45 – 12:30**      **Getting your Project Started**
- Grant Agreement preparation. Introduction to the Grant Agreement preparation tool. Consortium Agreement: what and how to include; decision making procedures, obligations and rights, financial issues and managing task and budget reallocations
- (12:30 – 13:30 Lunch break)
- 13:30 – 15:00**      **Technical Management and Reporting**
- How to prepare for the kick-off meeting; Setting up a communication and decision-making system, quality assurance, risk management, detailed work plan, project inception. Periodic and final reports: what to and how to report, irregularities and deviation management, internal quality assurance mechanisms, administrative issues, problem solving, tips for effective management and communication. Introduction to the online reporting tools.
- (15:00 – 15:20 Coffee break)
- 15:20 – 17:00**      **H2020 Financial Rules in theory and in practice – Part 1**
- Detailed introduction to financial rules for H2020 with real-life examples:
- Basic facts
  - Importance of the budget and of the resources;
  - Cost vs Price principle
  - Reimbursement models, forms of costs;
  - Eligible and non-eligible costs with comparison and all exceptions

# Horizon 2020 Project Management and Financial Reporting

## AGENDA

### DAY 4

**09:00 – 10:30**

#### **H2020 Financial Rules in theory and in practice – Part 2.**

- Introducing the cost categories
- Personnel costs calculations – showing the possible ways
- Subcontracting and other third parties
- Travel costs, Consumables vs. Overheads
- Equipment and assets
- Internally invoiced items
- Indirect costs calculation
- Funding Rates
- Receipt calculations
- Guarantee Fund
- Certificates on Financial Statements, Certificate on Methodology, etc.
- Payments and Exchange rates

(10:30 – 10:50 Coffee break)

**10:50 – 13:30**

#### **Workshop: Financial Reporting**

Participants prepare a financial statement for Horizon 2020, based on "dummy" invoices, salary slips, receipts and bills, time records and certificates, which are generated individually for each participant. Submission deadline 13:30.

(13:30 – 14:30 Lunch)

**14:30 – 16:00**

#### **Understanding the Financial Reports**

Pragmatic approaches in reporting; Point-by-point assessment of the prepared financial reports: Format, content; overall principles, possible bottlenecks, what should and should not be included.

**16:00**

#### **Final Q&A and closing of event**