European Funding Academy

5-6 February 2019

Vienna

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

AGENDA   DAY 1

08:30 – 09:00   **Registration**
09:00 – 09:15   **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)

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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

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**