European Funding Academy
Online

7-8 July 2020
Writing a successful R&I proposal

9 July 2020
Introduction to Horizon Europe

13-14 July 2020
Managing Efficiently an R&I project

16-17 July 2020
Financial rules of H2020 and Horizon Europe

Fully online:

live webinars complemented with e-learning
and live Q&A sessions

Writing a successful R&I proposal

7-8 July 2020

Mandatory module before the course

You can access the e-learning portal from 6th July 2020.

Are you completely new to proposal writing under H2020?

Don't worry, all participants will have the opportunity to prepare and get ready well in advance with our brand-new **Course 0.** This introductory course, in e-learning format, will help you refresh your knowledge or learn some basic information on Horizon 2020 proposal development if you are a newbie in this field.

Course 0: 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 with an outlook to Horizon Europe
- 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

AGENDA
Day 1

08:45 – 09:00   Accessing the webinar room

09:00 – 09:15   Event opening and introduction to the course

09:15 – 09:45   **Lessons learnt during Proposal Development under H2020 with an outlook to Horizon Europe**

- What can go wrong during proposal development? How to avoid and handle problems.
- Hearing the experiences of the participants – bring your own story!
- Key changes in Horizon Europe – starting with your mindset

09:45 – 10:00   Coffee Break

10:00 – 11:30   **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
- Section 2 will not be discussed in detail.

Afternoon – do the exercises on the e-learning portal at your own speed.
1-hour live Q&A session with the trainers will be held at 14:00. Q&A session link

AGENDA
Day 2

09:10 – 10:15   **Section 1.4 and 2.1 – Ambition and Expected Impact**

- So, what to include in Ambition 1.4 and what to Expected Impact 2.1?

- What innovation can we describe and how?

- 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

10:30 – 12:00   **Section 2.2 – Measures to maximise impact**

- 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

- Pre-proposal and proposal-stage legal agreements for consortia

- 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

- Knowledge management, Open Access, Open Data

- Dissemination and communication under Ethics and IPR issues

Do the remaining exercises on the e-learning portal at your own speed.
1-hour live Q&A session with the trainers will be held at 14:00. Q&A session link *(to be uploaded closer to the date)*

Introduction to Horizon Europe

9 July 2020

AGENDA
1-day course

09:00 – 09:10 **Accessing the webinar room**

09:10 – 10: 30 **Introduction to Horizon Europe**

- Structure of the programme
- What is new – focus on new funding schemes, financing rules
- Let's see the practical perspective on:
  – Sustainable Development Goals – the global agenda
  – Open Innovation, Open science, Open to the world in Horizon Europe (3Os)
  – Leadership in innovation and entrepreneurship
  – R&I missions
  – Clusters
  – New partnerships
  – InvestEU for R&I

10:30 – 11: 30 **Changes in Horizon Europe compared with H2020**

- Proposal writing
- Evaluation
- Financial issues
- Reporting
- Audits
- Impact monitoring

Access our learning repository and read more about Horizon Europe. You can also complete our quiz on the new programme.
1-hour live Q&A session with the trainers will be held at 14:00. Q&A session link

Managing efficiently an R&I project

13-14 July 2020

Mandatory module before the course

You can access the e-learning portal from 6th July 2020.

Don't worry; all participants will have the opportunity to prepare and get ready well in advance with this preliminary training chapter. This introductory course, in e-learning format, will help you refresh your knowledge on project management and coordination.

How to Coordinate and Manage your R&I Project?

Learn the tried and tested tools and methodologies from our team: essential project management and coordination tools and tips; dealing with partners; tools that will help to motivate and monitor your team; legal and administrative obligations; possible administrative and technical bottlenecks, legal problems.

AGENDA
Day 1

08:45 – 09:00   Accessing the webinar room

09:00 – 09:15   **Event opening and introduction to the course**

09:15 – 10:30   **Grant Agreement and the Consortium Agreement**

Short introduction to legal agreements. Non-Disclosure Agreements; Letters of Intent; Memoranda of Understanding; Letters of Commitment. Subcontracting and Third-Party Agreements. Grant Agreement – what are the rights and obligations you are committing to? Consortium Agreement: what and how to include; decision making procedures, obligations and rights, financial issues and managing task and budget reallocations. Tips – what to include and how? Amending a Grant Agreement – when and how?

10:30 – 10:45   Coffee Break

10:30 – 11:15   **Essential tools and "weapons" of a top-notch coordinator**

Having a good management system supported by clear and practical tools will enable you to efficiently develop your project results. We will show you the most essential tools that we crafted based on our extensive experience with managing projects and various consortiums: Organise a good kick-off meeting; Internal technical and financial report; Budget monitoring; IP management, Data management, assessing the D&C activities of the partners.

11:15– 11:30   Break for a coffee, late breakfast or other

11:30 – 12:00   **Communication and Dissemination: Things you wish you had known before the first periodic report.**

What does a communication manager need to effectively support the project activities? How can we set up a good communication plan & make the partners part of it from the beginning? At proposal stage, learn to select the right KPIs and stick to them along the way (unless reviewers change their mind!). Agree with partners how to collect their C&D numbers across the project and avoid last-minute confusion. Let's look at how to fill out the Dissemination table on the EU portal. Be ready for tweaks and changes in the Communication strategy and learn to anticipate reviewers' suggestions.

Do the exercises on the e-learning portal at your own speed.
1-hour live Q&A session with the trainers will be held at 14:00. Q&A session link *(to be uploaded closer to the date)*

AGENDA
Day 2

09:10 – 11:00   **Reporting obligations: Continuous reporting, Periodic Report, Final Report, Review meeting and some hints about reporting in Horizon Europe**

In this session, we will introduce the main steps and the responsibilities of the partners in the continuous reporting. We will discuss when and how the internal reporting should be completed to be able to identify "problems". We will explain how to prepare the periodic technical and financial reports: what to and how to report, irregularities and deviation management, internal quality assurance, tips for effective internal management of your partners and their reporting obligations.

EU assessment of the periodic report: typical mistakes in the periodic report. Showcase of a real H2020 periodic report, suspension of the payment letters. In this presentation, we will give you tips on how to be prepared for the review meeting. We close the presentation by sharing some information with you about the reporting obligations in Horizon Europe.

A break will be integrated.

Do the remaining exercises on the e-learning portal at your own speed.
1-hour live Q&A session with the trainers will be held at 14:00. Q&A session link *(to be uploaded closer to the date)*

Financial rules of H2020 & Horizon Europe

16-17 July 2020

Mandatory module before the course
You can access the e-learning portal from 6th July 2020.

Are you new to financial management of R&I projects? Or are you well-experienced?

We will introduce the essentials of finances in H2020/HEU to make sure you get things right from the very beginning. This homework is highly recommended for all participants.

Topics covered:

- How to harmonise national accounting protocols with the H2020/HEU Grant Agreement articles
- Budgeting and planning: Why is it the most crucial part?
- What is a cost reimbursement? What is lump sum financing?
- Actual costs and unit costs? Which one should I choose?
- What makes any cost eligible? How to make them eligible?
- Linking a cost to the project? What makes them direct costs?
- Can I report indirect costs? If not, why not?

AGENDA
Day 1

08:45 – 09:00	Accessing the webinar room

09:00 – 09:15 **Event opening and introduction to the course**

09:15 – 11:30 **Financial rules of H2020 and HEU – Personnel cost calculation**

- How to turn the salary costs into an eligible hourly rate?
- What's the difference between financial year-, and monthly-based calculation?
- Which one should you choose?
- Additional remuneration or bonuses?
- Employees or consultants?
- How to turn the salary costs into an eligible hourly rate?
- What's the difference between financial year-, and monthly-based calculation?
- Which one should you choose? Additional remuneration or bonuses? Employees or consultants?

11:30 – 11:45	Break

11:45 – 13:00 **Financial rules of H2020 and HEU – Third parties, subcontractors, other direct costs**

- Third party articles – why, there are more than one?
- Resource needed or service outsourced?
- Subcontractors or Linked third parties?
- Which one should be foreseen? Which one would your office prefer?
- Travel costs – for employees and for other – is there a difference?
- Equipment and other assets – how to calculate your facility costs efficiently?
- Other goods and services – what's in here?
- How about internal cost transfers and charges? Are they eligible?
- Funding rates, receipts, CFS rules and payments – learn them all!

Afternoon

Participate in our virtual exercise on cost reporting to Horizon 2020/Horizon Europe projects, and experience the importance of the grey zones!

Access to the full documentation of our signature workshop on Horizon 2020/Horizon Europe finance, and learn the rules while doing the reporting.

AGENDA
Day 2

10:10 – 12:10   Workshop solution

The workshop exercise is designed to help you understand how the rules of the Grant Agreement work in real life.

Based on the documentation received and the financial statement filled in by you, we will discuss:

- Personnel costs calculation for employees and consultants
- Which calculation gives higher eligible costs for the same salary?
- Subcontracting or other services – how to differentiate?
- Travel cost calculations, equipment, and other costs – are they always direct costs?