

# Managing efficiently an R&I project

13-14 July 2020

## Mandatory module before the course

*You can access the e-learning portal from 6<sup>th</sup> 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

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

**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 \(to be uploaded closer to the date\)](#)