European Funding Academy

8-11 October 2019

Budapest

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

Homework before the course

Are you completely new to H2020 project writing and management?

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

* An online link to course 0 will be shared after registration

AGENDA   DAY 1

08:30 – 09:00   **Registration**

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

09:15 – 10:15   **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

(10:15 – 10:30 Coffee Break)

10:30 – 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

(11:30 – 11:45 Coffee break)

11:45 – 13:00   **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

(13:00 – 14:00 Lunch)

14:00 – 16:00 Plan   **Proposal Development Workshop: Call analysis and the Work**

Participants are divided into small groups to practice the first steps of proposal development under Horizon 2020: call analysis, project concept development, formulation of the project objectives and a preliminary work plan - defining the work packages, developing a Gantt chart and a PERT diagram, identifying deliverables and milestones, establishing a complementary partnership.

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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: Impact, Dissemination and Communication**

Participants will identify how the project will contribute to each of the expected impacts mentioned in the call and address substantial impacts not mentioned in the work programme (RIA, IA); they will also learn how to differentiate between barriers and risks; 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 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**

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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 – 12:00   **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 committed 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?

12:00 – 13:00   **Getting your Project Started**

Kick-off meeting. Setting up the project management tools – a web platform or a package of Word and Excel templates? Web-based communication, telcos or f2f events? How many how often? How can you plan your budget spending and monitor it? How do you monitor the development of new knowledge and generation of new IP to be protected?

(13:00 – 14:00 Lunch break)

14:00 – 15:15   **Technical Management and Reporting**

Periodic and final reports: what to and how to report, irregularities and deviation management, internal quality assurance mechanisms – how to check deliverables or general quality of your actions, problem solving, tips for effective internal management of your partners and their reporting obligations. How do you follow dissemination or exploitation actions your partners do? Introduction to the official online reporting tools and show-case of a real H2020 report. What happens on a review, how is it organised?

(15:15 – 15:30 Coffee break)

15:30 – 17:00   **Workshop: Project Management Role-Play – Part 1**

Participants will play a game – entering a project consortium of unknown partners, knowing only their own tasks instead of having a good overview on all activities and results that the project should deliver. From the very start throughout the project duration they must face together certain challenges –
legal, management and financial problems. All participants will play different roles – representing partners with different interests. Your trainer will be the
Project Officer - helping you most of the time … let's see.

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AGENDA   DAY 4

09:00 – 10:30   **Workshop: Project Management Role-Play – Part 2**

Participants will continue the game – additional challenges will be solved related to dissemination, exploitation, partner conflicts – and a partner having serious financial problems. Hopefully you will be able to finalise the project and get all the max. EU contribution set in the Grant Agreement.

(10:30 – 10:45 Coffee break)

10:45 – 12:45   **H2020 Financial Rules in theory and in practice**

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
- Direct/Indirect costs
- Personnel costs calculations – showing the possible ways
- Travel costs, Consumables vs. Overheads
- Indirect costs calculation
- Funding Rates and EC payments
- Guarantee Fund
- Certificates on Financial Statements, Certificate on Methodology, etc.

(12:45 – 13:45 Lunch)

13:45 – 16:00   **Workshop: Budget monitoring and financial reporting**

Participants will have to solve financial challenges. Two exercises will be given that can be solved in groups or individually. The first exercise will refer to a budget monitoring, budget transfer issue. In the second part you will have to finalise a financial statement for a virtual Horizon 2020 project, based on some numbers available and some documents that can give you the remaining numbers (documents will be invoices, salary slips, receipts and bills, time records and certificates).

(14:45 – 15:00 Coffee break)

16:00   **Final questions, evaluation and closure of the course**