EUROPEAN FUNDING ACADEMY   **DAY 1**
13-16 June 2017, Budapest, Hungary

08:30 – 09:00   **Registration**

09:00 – 09:30   **Event opening**

09:30 – 10:00   **Warm-up discussion on H2020 Evaluation**

Participants have all received a project description and a H2020 Call with a Work Programme topic description. The warm-up discussion has the scope to highlight a few key issues leading to a successful H2020 proposal evaluation. By solving the task given to all participants before the start of the course and by discussing the solutions to the questions raised by the trainers, the attendees will have a good insight to H2020 project proposals before listening to the presentations.

10:00 – 11:15   **Proposal Development under EU Research and Innovation Programmes**
A hands-on approach

How to turn your novel idea into a winning concept? Finding a call, establishing a partnership and putting together a proposal. Pre-proposal and full proposal development, basic rules, project planning basis, content development and proposal writing. Planning resources and budgeting. Dos and Don'ts.

(11:15 – 11:30 Coffee break)

11:30 – 16:00   **Workshop: Horizon 2020 Proposal Development**

Participants are divided into small groups to practice the first steps of proposal development under Horizon 2020. The process of developing a real winning H2020 proposal will be followed.

Session 1
Call analysis, project concept development, formulation of the project objectives and a preliminary work plan.

(13:00 – 14:00 Lunch Break)

Session 2
Defining the work packages, developing a Gantt chart and a PERT diagram, identifying deliverables and milestones, establishing a complementary partnership, and discussion on impact and exploitation issues.

(14:45 – 15:00 Coffee Break)

Session 3
Finalising the proposal with developing a sound budget, discussing final issues and introducing a real proposal.

16:00 – 16:30   **Understanding the Evaluator's perspective**
Understanding the evaluation procedure from A to Z to better compose your next proposal. Main aspects and criteria of evaluation. Useful tips to address the evaluation criteria effectively.

Based 100% on experience

09:00 – 10:30 **Successful Dissemination & Communication in Horizon 2020 Projects**

Definitions; Learning from best practices in FP7 and H2020 projects; New tools, strategies and channels to reach your target group and communicate the right message in the right way; What are the requirements of the European Commission, what are your legal obligations? Dos and don'ts in H2020 dissemination and communication section under Impact.

(10:30 – 10:45 Coffee break)

10:45 – 12:00 **Exploitation Strategies in Horizon 2020 Projects during proposal development and implementation**

Definitions; Challenges, expectations, requirements and best practices to develop successful exploitation plans for H2020 proposals and projects. Why is IP important and how to build up IP and innovation management for your project? How to identify and select the best exploitation, IP and innovation strategy fitting your H2020 project?

(12:00 – 13:00 Lunch Break)

13:00 – 16:00 **Workshops**

Participants are divided into two (Group A and Group B) to practice the development of the Impact section of the proposal based on a real example with two parallel workshops.

For Group A: Workshop 1 "Dissemination & Communication"

Participants will be divided into two groups. Based on a real-life case scenario, one group will prepare the work package description, the other group the dissemination and communication strategy for the proposal.

For Group B: Workshop 2 "Exploitation & Innovation"

Using the same project example, the participants must analyse the needs and possibilities of the project partners and identify the best scenario for exploitation and IP strategy. As a result, the participants will have to describe the most relevant exploitation routes and set up a tailored innovation and IP management method for the project.

(14:30 – 14:45 Coffee Break)

For Group A: Workshop 2 "Exploitation & Innovation"
For Group B: Workshop 1 "Dissemination & Communication"

16:00 – 16:20 **Wrap-up**

09:00 – 09:30   **Event Opening**

09:30 – 10:30   **How to Coordinate and Manage your H2020 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

08:30 – 10:00   **H2020 Financial Rules in theory and in practice – Part 2**

- Direct/Indirect costs;
- Personnel costs calculation, including
    - Actual and unit-based calculations
    - Employees, Fiscal-year based and monthly based calculations
    - Productive hours, typical errors
    - Secondments, in-house consultants, and SME-owner rate
- Subcontracting and Third Party articles
- Other costs:
    - Travel costs
    - Consumables vs. Overheads
    - Equipment, Facility charges, Other costs
- Indirect costs calculation
- Funding Rates, exchange rates and EC payments
- Guarantee Fund and Certificate on Financial Statement

(10:00 – 10:20 Coffee Break)

10:20 – 13:00   **Workshop: Financial Reporting**

Participants prepare financial statements for FP7 and Horizon 2020, based on "dummy" invoices, salary slips, receipts and bills, time records and certificates, which are generated individually for each participant. Submission deadline 13:00.

(13:00 – 14:00 Lunch)

14:00 – 15:30   **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.

15:30 – 16:00   **Financial Reporting, EC Reviews and Audits**

Technical and financial audits and reviews – how do they happen? The Beneficiaries' Perspective: Pragmatic approaches in financial reporting; Experiences with EC Audits: how to prepare – format, content, overall principles, possible bottlenecks, what should and should not be included, project closure and audits.

16:00   **Final Q&A and closing of event**