

EUROPEAN FUNDING ACADEMY
21-24 June 2016, Budapest – Hungary

DAY 1

08:30 – 09:00 **Registration**

09:00 – 09:30 **Event opening**

09:30 – 11:00 **Introduction to Horizon 2020 and Proposal Development**

Horizon 2020 structure. Rules of participation. Eligibility issues, official documents, finding a call, call analysis, selection criteria, partnership considerations and proposal templates. General aspects of proposals under H2020. Getting started with actual proposal development.

(11:00 – 11:30 Coffee break)

11:30 – 12:30 **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.

(12:30 – 13:30 Lunch Break)

13:30 – 16:30 **Workshop: Proposal Development – Part 1**

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.

(14:45 – 15:00 Coffee Break)



- 09:00 – 10:00** **Horizon 2020 Financial Aspects – Budget Development**
- Financial rules of H2020. Eligible costs, Funding limits, Cost models, Direct costs and Indirect costs. Planning and developing a project budget. Considering and estimating the necessary resources. Calculation of personnel costs and other direct costs. Practical tips for effective budgeting.
- (10:00 – 10:15 Coffee Break)
- 10:15 – 12:30** **Workshop: Proposal Development – Part 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.
- (12:30 – 13:30 Lunch)
- 13:30 – 14:30** **Workshop: Proposal Development – Part 3**
- Finalising the proposal with developing a sound budget, discussing final issues and introducing a real proposal.
- (14:30 – 14:45 Coffee Break)
- 14:45 – 15:45** **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. Analysing real evaluation summary reports (ESRs).
- 15:45 – 16:00** **Final Q&A and closing of event**

9:00 – 12:00**H2020 Financial Rules in theory and in practice**

Detailed introduction to financial rules for H2020 with real-life examples:

- » Basic facts, definition of the budget, importance of the resources;
- » Reimbursement models, forms of costs;
- » Eligible and non-eligible costs with comparison and all exceptions;
- » Direct/Indirect costs;
- » Personnel costs calculation – 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, Certificate on
- » Average Personnel Costs, etc.

(10:30 – 10:45 Coffee Break)

(12:00 – 13:00 Lunch)

12:00 – 14:30**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 14:30.

(13:30 – 13:45 Coffee Break)

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.

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DAY 4

- 09:00 – 9:45** **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.
- 9:45 – 11:30** **Getting your Project Started**
- Grant Agreement preparation. Online tools. How to prepare for the kick-off meeting. Setting up a communication and decision-making system. Quality assurance, risk management and work progress planning. Consortium Agreement: what and how to include; decision making procedures, obligations and rights, financial issues and managing task and budget reallocations.
- (11:30 – 11:45 Coffee Break)
- 11:45 – 12:30** **Technical Management and Reporting**
- 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. Examples of online reporting tools and technical reports.
- (12:30 – 13:30 Lunch)
- 13:30 – 15:00** **Workshop: Project management**
- Real-life based scenarios and role-play exercise on Administrative and Legal Management; Technical management and Reporting; Financial problems; Dissemination and Exploitation
- (15:00 – 15:15 Coffee Break)
- 15:10 – 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**