Welcome!

We will start the webinar 12:00 CET.

The presentation slides and recording will be published on [http://www.ncpacademy.eu/](http://www.ncpacademy.eu/) in due time after the webinar.
Advising brand-new Horizon 2020 participants

Webinar
16th March 2018

Morten Gylling, DAFSHE, NCP Academy Partner
Melanie Büscher, Brain2Business, former NCP
Who are we?

• NCP since 2015 – Legal/Finance and MSCA
• Has worked with FPs since 2010
• Loves giving participants subtle hints on what procedures could be a bit too creative with regards to EU.

• NCP from 2007 to 2017 – mostly Legal/Finance
• Since October 2017: own company as certified facilitator and trainer
• Enjoys discussing EU rules and reporting requirements.
Enough about us. What about you?
Think of one of your clients. How would they describe their H2020 experience? If you use an image, a metaphor...

Participating in H2020 is like....
Let’s find out how we can turn H2020 participation into a walk in the park!
What are we going to talk about?

• Grant Agreement Preparation Phase
• Cost accounting
• Important rules during project work
• Financial reporting
• Technical reporting
• Summary and good advice
Goal of this webinar

• To present the most common administrative challenges in Horizon 2020 in an easily understandable way

• After this webinar, participating NCPs will be able to explain the most important issues to their new clients at eye level
Non-aim of this webinar

• We will not go into the details!
• We will not cover everything.

Please look at previous webinars on www.ncpacademy.eu to find webinars and presentations that go into depth.
Winning a H2020 grant is almost like winning the lottery. But not when it comes to spending the money...
Grant Agreement Preparation Phase (GAP)
1. Prepare Grant Agreement
2. Read contracts
3. Send documents
4. Receive pre-financing
5. Project START
6. Make amendments if changes in Work Plan
7. Follow specific rules for subcontractors
8. Report deliverables (several times)
9. Fill in timesheets
10. Stick to best value for money practice
11. Follow usual accounting practices
12. Keep records for cost & work
13. Calculate hourly rate for personnel

NCP Academy: Training National Contact Points
Grant Agreement Preparation Phase

As project partner

• Read the documents so that you know what you are signing up for! Grant Agreement... Consortium Agreement...

• Prioritize messages by the coordinator and the EU.
Grant Agreement Preparation Phase

As project partner

• Be prepared to send documentation proving that your organisation exists ("Validation of your organisation") with rather short deadlines.

• Get familiar with the Participant Portal and who inside your organisation is allowed to sign which document electronically.
Grant Agreement Preparation Phase

As project partner

• With regards to the project tasks assigned to you – does your organisation plan on carrying them out by itself? Or will you get the help of others?

• Is that foreseen in your task descriptions? If not – change it!
Grant Agreement Preparation Phase

As coordinator

• Make sure that all project partners know what and when to deliver.
• Make a list of contact persons (scientific, legal and financial) in all partner organisations.
• Remind partners of connecting the right people to the project on Participant Portal ("LEAR", "LSIGN" etc.)
Grant Agreement Preparation Phase

As coordinator

• Communicate shortly, clearly and constructively to all partners.
• Set up a telephone meeting with your project officer to go through the grant agreement preparation process.
Project start

• Prioritize your participation in the kick-off meeting!

As coordinator

• Make sure all partners know what is expected from them.
• Present briefly the most important legal and financial aspects of Horizon 2020 rules.

(Check: are you sure you really know the rules? There are many misunderstandings out there. If in doubt: ask your NCP)
1. **Preparation**
   - Prepare Grant Agreement

2. **Start (Always)**
   - Read contracts
   - Send documents

3. **Project Start**
   - Receive pre-financing

4. **Work Plan**
   - Fill in timesheets
   - Stick to best value for money practices
   - Follow usual accounting practices
   - Keep records for cost & work

5. **Follow Specific Rules for Subcontractors**

6. **Financial Report**

7. **Make Amendments if Changes in Work Plan**

8. **Report Deliverables (Several Times)**

9. **2nd Project Period**

10. **Calculate Hourly Rate for Personnel**

11. **European Union Flag**

12. **NCP Academy Contact Points**
Pre-financing

• The EU contribution is to cover (most of) your project related costs.
• It is not an income.
• Pre-financing is EU property until technical and cost reporting is approved.
Pre-financing – for coordinators

• Make sure that you have the right bank account of each partner.
• Distribute the shared amount of pre-financing to each partner.
• Email financial contact persons about the transfer and ask them to confirm that the amount has been received.
Question to participants

• One piece of advice that is new to me so far
Question to participants

Where do you think the most common mistakes occur when reporting costs to H2020?
Cost accounting

• Follow your usual accounting practices!

• Keep records
  • for your time spent on the project (time-sheets!)
  • when you use durable equipment on the project (log-books)
  • when you buy products, material, services etc. related to project work

• Remember that the EU wants transparency on what you spend their money on.
Cost accounting practices

• Spend project money carefully!

• When buying products or services: make sure you can prove that you have chosen best value for money!

• All costs have to be project-related and must be necessary for the implementation of the project.
During project: coordinator

• Establish a good and regular contact to all work package leaders.
• This will help you monitor progress.

• Read these 10 practical tips on research project management
During project

• Is someone else outside your organisation contributing to the project?
• Fx another company, or your sister company, or a member of your association...?
  • Check whether this is foreseen in the project description.
  • If not, talk to your coordinator and your NCP.
During project

• Changes in work plan
  • Getting behind the schedule? Ahead of schedule?
  • Having to find work-around or alternative solutions?
  • Project work getting more costly? Or less?
  • New dissemination opportunities?

• Inform the consortium and the coordinator.

• In some cases, the coordinator needs to make official changes to the project description.
During project

• Do you contribute to the description of the projects’ official deliverables?
• If yes, plan ahead in the writing process.
• Great opportunity to show what the consortium is capable of!
Question to participants

Please share with us: One piece of advice that fits very well with what you have known already

Please use the chat feature in the lower left corner of your screen.
Financial and technical reporting

• An intense period with regards to administrative work.
• Prioritize communication from the other project partners and the coordinator.
• Keep the internal deadlines.
Prepare Grant Agreement

Receive pre-financing

Project START

Send documents

Read documents

Make amendments if changes in Work Plan

Follow specific rules for subcontractors

Report deliverables several times

Financial report

Payment report

2nd project period

Calculate hourly rate for personnel

Fill in timesheets

Stick to best value for money practice

Follow usual accounting practices

Keep records for cost & work
Financial reporting – intense period

• Follow the rules for budget categories so that you can fill in the schemes correctly.
• Sum-up costs under each budget category.
• Double-check you can document all the costs you report to the EU.
• Double-check that you are reporting costs, not estimates nor prices.
• Any unusual expenses? Make sure they are explained in the technical report.

• Ask your NCP if in doubt.
Financial reporting – intense period

• People working on the project: you have to calculate their hourly rate per financial year!

"I'm here about the details."
Technical reporting

• Usually, all project partners participate to the reporting.
• Make sure there is consistency between technical and financial reporting.
• What are the approval procedures for the technical reporting? Have you made sure you have a say?
Financial and technical reporting - coordinator

- Remember you are responsible for uploading all documents to Participant Portal.
- Make sure everyone knows the time plan and deadlines.
Financial and technical reporting - coordinator

• Check that all partners have contributed and not sent in wrong documents.

• Review all financial statements but do not think you are an auditor!

• Make sure that partners only mention activities covered by the project and not their other work in other projects.

• Check that all obligations towards open science, acknowledgement of EU funding and IPR have been followed.
Interim payment

• Check that the amounts are correct and as agreed beforehand.
Interim payment - coordinator

• Make sure that you still have the right bank account of each partner.
• Distribute the shared amount of the interim payment to each partner.

• Email financial contact persons about the transfer and ask them to confirm that the amount has been received.
• Do not surprise your consortium – stick to what has been agreed upon in the consortium agreement.
Ask participants

• When you think back at what we have touched upon and the advice you are giving your newcomers, what will you continue to do or tell?
• What will you start doing from now on?
Some advice from us

➔ Inform your clients on the documentation requirements straight from the start.
➔ Inform your clients on the intense phases – administration-wise.
➔ Remind your clients of the best value for money principles.

➔ It is like winning the lottery, but with a lot of rules.
  And there are (almost) no work-arounds.

Any QUESTIONS?
Q&A session

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