NCPs CaRE

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Content

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1. Introduction

In order to improve SC5 NCPs training skills, a special set of best practices suitable for conducting more effective trainings on certain problematic topics were collected among NCPs CaRE network.

The topics addressed in this guide were chosen according to the input

- from electronic questionnaire “NCPs CaRE Questionnaire for ENP NCPs on barriers they need to facilitate participation in the forthcoming meetings and trainings”,
- suggestions made by NCPs CaRE T.3.2. members and
- following the discussions within NCPs CaRE network over further inclusion of ENP countries to NCPs CaRE activities and to Horizon 2020 programme in general.

The **special target audience** of this guide are the **EU-13 and ENP countries SC5 NCPs**, but of course the training methods for these seven topics proposed by our task are very relevant to all the SC5 NCPs.

The seven best practice methods for improvement of NCP trainings include also descriptions on how to implement these activities in practice.

The final step to understand how to use the proposed well-working methods/excercises in practice will be a **workshop** "SC5-related funding opportunities for EU-13 & ENP countries: Best practices for trainings" (due month 51). The aim of the workshop will be to try in practice the proposed methods/excercises for introducing some problematic topics in trainings.

Here an overview of the timeline:

- March 2019 - Milestone 3.8 (month 50) **draft** of the **practical guide** “Best practices for trainings”
- April 2019 - Deliverable 3.8 (month 51) – **guide** “Best practices for trainings”
- September 2019 - Milestone 3.9 (month 56) **draft programme** for the workshop “Best practices for trainings”
- November 2019 - Milestone 3.10 (month 58) **Workshop** “How to best prepare EU-13 & ENP for SC5 related Funding opportunities – Best practices for trainings”
- February 2020 - Deliverable 3.9 (month 61) Workshop **report** “How to best prepare EU-13 & ENP for SC5 - related funding opportunities – Best practices for trainings”

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2. Topics covered by “Best practices for trainings” guide

Topic 1: Exercise on Communication, Dissemination and Exploitation – prepared by CVTISR

Topic 2: Reporting. Practical insight how consortium works. Differences between milestones and deliverables – prepared by ETAg

Topic 3: Partner search – prepared by AKA

Topic 4: How to increase your competitiveness in Horizon 2020 calls? – prepared by RPF

Topic 5: Project writing – prepared by TC ASCR

Topic 6: Project evaluation – prepared by AMEUP

Topic 7: Project management – prepared by ETAg

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2.1 Exercise on Communication, Dissemination and Exploitation

Time: 30 - 45 min

Introduction

1. EC video on the importance of communicating your project

   https://www.youtube.com/watch?v=EfXCOyw6FVw

2. Short presentation – why there is a need to prepare Communication, Dissemination and Exploitation plan

3. Explain differences between communication, dissemination and exploitation (*Source of info for example: https://www.iprhelpdesk.eu/sites/default/files/EU-IPR-Brochure-Boosting-Impact-C-D-E_0.pdf*)

Exercise 1

- Prepare a board/flipchart with 3 columns: Communication/ Dissemination/ Exploitation.
- Hand out post-it sticky notes – each participant will have at least one post-it note with a word related to the topic.
- Each participant must decide in which column to put his/her post-it note.
- When everyone is finished, discuss and correct their answers (some words may fit in more than one column, especially communication/dissemination and dissemination/exploitation sometimes overlap).

Post-it notes ideas:

Communication: project, results, presentation, press release, brochure, public, EU emblem, TV, radio, blog, social media, newspaper, exhibition, interview, during the project, promote EU funding, leaflet, brochure, newsletter, roll-up, banner

Dissemination: making results available for use, scientific community, peer-reviewed articles, conference, presentation, open access, data management plan, knowledge transfer, scientific publications, online repository, after the end of the project, during the project, poster

Exploitation: patent, making use of results, licensing, IPR, copyright, design rights, trademarks, utility models, after the end of the project, during the project, ownership, access rights, business plan

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What to prepare ahead?

- Post- it sticky notes (according to the number of participants)
- Write relevant words
- Prepare flipchart with 3 columns – Communication, Dissemination, Exploitation
- Optional – prepare an introductory presentation

Exercise 2

1. Divide participants into smaller groups.
2. Hand out abstract of the project (source Cordis) – each group can have their own abstract or the same.
3. Groups should identify target audiences, define communication objectives, formulate key messages and choose relevant medium for communication.
4. Groups should define targeted audiences/stakeholders that will potentially use their results, come up with ways of disseminating of the results.
5. Groups should map potential valuable and exploitable results – how would they exploit/ protect their results?
6. Sum-up: each group will present their own Communication, Dissemination and Exploitation plan.

What to prepare ahead?

- Choose appropriate abstract/s from Cordis
- Prepare sufficient number of copies
- Try to come up with your own ideas on communicating, disseminating and exploiting the project/ results (so that you can help participants), however there is no one correct result of this exercise – it´s up to everyone´s creativity ☺

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2.2 Reporting. Practical insight how consortium works. Differences between milestones and deliverables.

Time: 25-35 minutes (depending on participants' previous knowledge)

Introduction

- Reporting periods of Horizon 2020 projects depend on the duration of your project.

Project duration in months	Max number of reporting periods
1 – 18	1
19 – 36	2
37 – 54	3
55 – 72	4
73 – 90	5

- Periodic report is submitted after each reporting period. Periodic report is submitted by coordinator. Coordinator has 60 days to submit the report after the end of the reporting period.
- At the end of the project – the last perodic report is subitted with final report of the project.
- The milestones and deliverables of the project are submitted on a rolling basis and according to the deadlines of Grant Agreement Annex I. All the milestones and deliverables of the project are submitted to Funding & Tenders protal.
- Periodic report consists of:
  - **periodic technical report**
    - an explanation of the work carried out
    - an overview of the progress towards the objectives (incl milestones and deliverables; dissemination and exploitation)
    - a summary for publication
    - answers to the questionnaire (H2020 indicators)
  - **periodic financial report**
    - individual financial statement
    - explanation for the use of resources
    - periodic summary financial statement (is generated automatically)

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NB! More information available at Annotated Model Grant Agreement http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf

- Periodic report will be submitted during 60 days after the end of the reporting period
- Final report consists of:
    - **final technical report**

      - summary for publication:
        - an overview of the results and their exploitation and dissemination
        - the conclusions on the action
        - socio-economic impact of the action
    - **final financial report**
        - final summary financial statement
        - certificate on the financial statement

        NB! More information available at Annotated Model Grant Agreement http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf
- Final report will be submitted during 60 days after the end of the project and together with the last periodic report
- Attention: the last periodic report also / still needs to be submitted.

Exercise

- Prepare three tables with information needed for the exercise
- The first table contains information about participant number, participant organisation, participant organisation name, participant short name and country of the participant.
- The second table contains information about work package number, work package title, lead participant number (of the work package), the short name of the lead participant, the start month and the end month of the work package.
- The third table contains information about the number of the deliverable, the name of the deliverable, number of the work package, short name of the lead participant, date of delivery.
- The participants are divided between participant organisations so that there are at least 2 persons in one organisation.
- One person of the organisers will be the timeline which will be drawn to the wall. This person will announce the time (e.g. month 1, month 2…).
- One person of the organisers will be the representative of the EC project officer whose task is to check if all the milestones and deliverables are submitted on time.
- The milestones and deliverables are written to post-its and coordinator will divide them between project partners.

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- Project partners (and the coordinator) will be submitting their deliverables or milestones according to the information in the table 3 to the timeline on the right moment (e.g. month 1 – deliverable 1 etc).
- At the end of the exercise the EC's project officer checks if everything is submitted to the timeline as it was planned (based on the information in table 3).
- Feedback by the organisers at the end of the exercise

What to prepare ahead?

- Tables with initial information about the participants, work packages and deliverables/milestones
- Post-its with deliverables and milestones.
- Timeline for the wall (with the numbers of months) on paper or on board

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2.3 Partner search

Time: ~45 min

Introduction:

1. Present shortly “How to find project partners” webpages
    a. Funding & Tenders/Participant Portal H2020 online manual
    http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/find-partners_en.htm
    b. EASME
    https://ec.europa.eu/easme/en/section/horizon-2020-environment-and-resources/how-find-project-partners

2. Present different partner search tools
    a. NCPs CaRE (-> DEMO)
    http://partnersearch.ncps-care.eu/
    b. other thematic NCP networks (lists prepared by NCPs Care and EU)
    http://partnersearch.ncps-care.eu/index.php?index=62

    http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/find-partners_en.htm

    c. EEN partners for business
    https://een.ec.europa.eu/partners
    d. BBI JU Partnering platform
    https://www.bbi-europe.eu/participate/bbi-ju-partnering-platform
    e. Funding & tenders partner search for topics

    Show an example of published partner search for open SC5 topic

3. Find project partners among the participants in past EU projects
    a. Funding & tenders portal (Cordis)
    https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/partner-search
    b. Project catalogues relevant to SC5 calls
    SC5 calls
    http://ec.europa.eu/research/environment/pdf/research_and_innovation_sc5_projects_2014-2017a.pdf
    CE calls (no information about the partners)
    http://ec.europa.eu/research/environment/pdf/h2020_projects_circular_economy_2016-2017.pdf

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4. Partnering events organised by e.g. NCPs or the EEN during infodays.
   Information about events e.g.
   - H2020 Newsroom (choose events) https://ec.europa.eu/programmes/horizon2020/en/newsroom/
   - NCPs CaRE/Service to applicants/Brokerages http://www.ncps-care.eu/?event-categories=brokerage
   - EASME/Environment/SC5/Information days https://ec.europa.eu/easme/en/horizon-2020-societal-challenge-climate-action-environment-resource-efficiency-and-raw-materials

5. Social media
   Environment projects & partner search – EASME
   https://www.linkedin.com/groups/7001906/

Excercises

1. How NCPs CaRE Partner search is working (demo)

2. How I can find partner offers for open H2020 call topics using Funding & Tenders portal (demo)

3. Find Environment projects (EU 3.5) from your own country using Funding & Tenders (Cordis) portal: how many projects did you find from your own country?

4. Find business offers from your country using EEN portal: how many did you find and were there any for Horizon 2020 calls?

What to prepare ahead?

- A short presentation with slides about each subtopic with links.

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2.4 How to increase your competitiveness in Horizon 2020 calls?

Time: 60 minutes (20’-30’ for Exercise 1 and 30’-40’ for Exercise 2)

Introduction

1) To get information on the work done in countries which are competitive/successful in Horizon 2020.

2) To discuss possible actions in less competitive/successful countries.

Exercise 1

Sharing of experience by 1 or 2 NCPs in countries with success in Horizon 2020 calls (either in SC5 or in general).

For achieving better results in Horizon 2020 it is important to see the steps made by other countries in achieving this goal, what worked in their case and what might not have worked.

The NCPs can be present at the event or participate through teleconferencing.

Their presentation can focus on the best practices in their counties and any actions / initiatives that helped enchance their competitiveness in Horizon 2020. It can be related to the choice of partners, coordinator, good identification of topic or participation in supporting networks e.g. thematic COST network or organising a specific Horizon 2020 voluntary interest groups at the organisation level (e.g. members of the same organisation help each other in writing and/or reviewing the proposals).

For the last part of the presentation they could be asked to propose some actions that they think that could work in EU13 countries, based on their experience.

This part/exercise can take up to 30’ if it’s decided to get the experiences from 3-4 NCPs in other countries.

Exercise 2

What can I change in my country? (10’)

Participants can be asked to write on a flipchart one thing that could be changed in their country.

Group discussion (20’)

The 4 most popular topics can be chosen and participants can work in groups to think about possible specific actions for in their countries for each topic. At the end, each group can briefly present the results from the discussion in 1’.

The time for Exercise 2 depends on number and duration of testimonials in Exercise 1.

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What to prepare ahead?

- Find success stories and ask NCPs to share their experience.
- Prepare for the session, either by:
  - Making travel arrangements for participants, or
  - Making sure there's good internet connection at the venue and find the tool to be used if the option of teleconference is chosen.
- Think about possible actions that need to be done by NCPs in order to facilitate the group discussion, if needed.
- A flipchart and markers

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2.5 How to write a good abstract

Time: 15 min

Introduction

1) The purpose of the topic is to pass the recommendations of the Horizon 2020 evaluators not to underestimate the importance of the well written abstract.

2) Present a short (1 slide) overview of important features of a good abstract.

Exercise

- Two well-chosen real abstracts (one almost perfect, one with shortcomings) are distributed to all participants who are then given 5 minutes for reading.
- Participants are divided into groups of 3-4 persons and given 5 minutes for the discussion.
- Representatives of each group present their opinions on both abstracts (in some cases opinions inside one group can differ, so it is possible to have more than one presenter).
- Lecturer presents both abstracts on slides with highlighted shortcomings.

What to prepare ahead?

- Two abstracts in proper number of copies
- Slides with introductory presentation and final summary.

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2.6 Project Evaluation

Time: 40-45 minutes (depending on participants' previous knowledge)

Introduction

Evaluations in Horizon 2020 - How will the European commission evaluate applications? How do Horizon 2020 (H2020) evaluators read proposals? What are the pitfalls that make H2020 evaluators subtract points? This exercise sheds on several of those pertinent and often unresolved questions that proposers ask themselves when writing proposals for H2020.

Please see also recommendations of SC5 evaluators from the "E-Booklet of Best Practices" at NCPs CaRE website (section "Uselful guides").

Exercise

First, split in 4 groups. Each group should choose only one of the following topics.

1. Admissibility and Eligibility check

2. Individual evaluation – focus on Excellence

3. Individual evaluation – focus on Impact

4. Individual evaluation – focus on Quality and Efficiency of Implementation

First, every group forms a list composed of parameters/questions you think that evaluators check/raise at a particular stage. Discuss and list the priorities, common pitfalls etc. Discuss the content of Individual Evaluation Report (IER).

Next, only one representative (the 'evaluator') should be chosen from each group to form a Consensus group (4 evaluators). The outcome of the evaluation process is an Evaluation Summary Report (ESR). The task of this part of the exercise for Consensus group is to write an example of ESR based on points made by 4 groups discussing the evaluation at particular stage. Keep in mind that the project should be above the threshold (positive evaluation).

Go through the checklists of the individual reports. Discuss whether you agree with the points made in the checklists. You may add more points. Think what you would emphasize and report in the ESR. Structure the ESR using the whiteboard. Write down the examples of positive/negative comments. Present the ESR using the whiteboard. Discuss the next steps in the evaluation procedure (panel evaluation, finalization).

What to prepare ahead?

- One or two general introductory slides about the Evaluation in Horizon 2020
- Prepare four tables with information needed for the exercise
- Prepare whiteboard/flipchart for the ESR assignment
- Suggestion: Invite an evaluator to share his/her experience

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2.7 Project management – How to find solutions to different problems during project life time?

Time: 2h

Introduction

During the project implementation phase there are always some difficulties which need to be addressed. Pro-Action Cafè is a suitable method for defining the core of the problem and planning the next steps to towards resolving the situation/problem. This is a good method to introduce to project managers to improve their problem solving skills. This method would be also suitable for trainings where sharing one´s experience is expected (e.g. meetings of project coordinators or advanced applicants etc.).

Exercise

Pro-Action Café

- Choose a topic (related to project management)
- A short introduction on the topic would be recommended
- Ask participants to send their questions/concerns related to the topic in advance or collect their input on site
- Write all questions on paper
- Tape the questions to the wall
- Let the participants vote for the most interesting questions
- The number of final chosen questions depends on the number of the participants who would be divided between the discussion tables. Would be good to have 4-6 participants in each discussion table.
- Discussions at the tables:
  Round 1: What is the question behind the question?
  Round 2: What is missing?
  Round 3: What is next?
- In each table there is a table keeper filling the A0 sheet with three above mentioned questions.
- Presentation of the results (by table keepers)

What to prepare ahead?

- Choose a topic
- Choose a suitable room with sufficient number on tables for discussions
- Contact participans in advance and collect their problems/questions/concerns or ask them to think about their problems/questions/concerns related to the topic
- Stikers or markers for voting
- Papers with written problems/questions/concerns for walls
- Scotch tape

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- A0 sheets for each discussion table with three questions:
    1) What is the question behind the question?
    2) What is missing?
    3) What is next?

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