

REPORT

BESTPRAC Training School:

“Administration of research funding: dealing with several funding sources (for non-university research organisations in inclusiveness targeted countries)”

September 27-29, 2016

Centre for Social Innovation, Vienna

Objectives

Research organisations from COST inclusiveness target countries have the possibility, but also the challenge to use several different funding sources for R&D and Innovation such as Structural Funds (INTERREG, ESF, EDRF, etc.) as well as Horizon 2020. Research administrators face several difficulties in this respect.

Focus of the BESTPRAC training school was to provide know-how and the possibility to discuss and exchange experiences. Furthermore, the training should give an input on the conditions of multi-project management with different funding sources from the points of view of project planning, implementation and reporting, audits, documentation requirements, etc.

The training school concentrated on practical examples, exercises and how to deal with multiple funding sources related to the financial administration.

Special attention was given to:

- Session 1: *Project planning* (financial tools, budget calculations, cost categories, overheads, Consortium Agreement etc.)
- Session 2: *Project implementation and reporting* (personnel costs and timesheets, other costs, financial controlling, amendments, internal and external communication and commitment etc.)
- Session 3: *Audits* (preparation and implementation for audits)
- “Exchange mart” with bilateral meetings to encourage the participants to exchange their experiences and discuss challenges and best practices

Trainers

Anne-Katrin Werenskiold, Head of the EU-Office at the Max Planck Institute of Biochemistry Martinsried, Germany

Jaco de Graaf, Project Administrator/ Advisor Projects at Leiden University Medical Center

Katarina Rohsmann, European and International Programmes, Austrian Research Promotion Agency

Wolfgang Michalek, Managing Director, Centre for Social Innovation

Andrea Mayr, Financial Controlling, Centre for Social Innovation

Carmen Siller, Senior Project Manager, Centre for Social Innovation

Gorazd Weiss, Senior Project Manager, Centre for Social Innovation

Venue

Centre for Social Innovation (Zentrum für Soziale Innovation GmbH)

Linke Wienzeile 246

1150 Vienna

Tel. +43-1-4950442-0

<http://www.zsi.at>



Programme

First Training Day: September 27, 2016

The first Training Day started with the welcome by Martina Pöll (Grant Holder) and Wolfgang Michalek, Managing Director of the Center for Social Innovation, and continued with the presentations of the participants in which they showed the “ways of dealing with documentation of different cost categories, reportings and audits” in their organisation. After a short coffee break, Jaco de Graaf informed on the results from the “BestPrac Survey on European Structural and Investment Funds” and gave best practices related to enabling synergies with other financing programmes.

In the afternoon session, Anne Katrin Werenskiold presented information on project planning. Afterwards, Katarina Rohsmann continued with legal and financial issues in H2020 and audits.

Second Training Day: September 28, 2016

At the beginning of the second day, Anne Katrin Werenskiold introduced in scientific reporting and communication. Afterwards, Andrea Mayr informed on the administration of financial reporting at the ZSI and gave some practical examples from the ZSI like timesheets for different types of funding, the ZSI time records, financial overview tool for FP7/H2020 projects etc. For exercise, the participants formed two groups with each group receiving around 12 questions concerning financial reporting which they had to discuss and analyze.

Anne Katrin Werenskiold continued with information on amendments in H2020 projects. After a short coffee break, Gorazd Weiss gave an insight into project management of H2020 projects.

In the afternoon, the “Exchange mart” started. At the beginning, all participants were encouraged to write their key questions and challenges concerning the administration of research funding on a flipchart. Afterwards, the participants discussed in three groups their solutions and recommendations.

Third Training Day: September 29, 2016

The morning session of the last day started with the discussions of the results/conclusions from the group work (Exchange mart). After a short coffee break, it was continued with Session 3 “Audits”. Carmen Siller explained in her presentation the experiences of the ZSI with an EC financial audit of an FP7 project and gave general recommendations for audits (requested and prepared documents, lessons learnt, etc.). During a group work, the participants received a copy of a letter from the European Commission with all documents required for an audit with the task to discuss it with their neighbors. Jaco de Graaf presented also valuable suggestions and tips for audits. The session was closed with his practical exercise “Be an auditor yourself”. So the participants could acquire tools and procedures which could be useful in their daily work.

Participants

It was planned to invite up to 15 trainees involved in the administration and management of several funding programmes from COST Inclusiveness Targeted Countries. Their costs for travel and accommodation should be covered by a lump sum of 750 Euros.

We received in total 20 applications from 13 different COST Countries. Finally, 13 participants from 10 COST Countries visited the BESTPRAC Training School (1 participant from Poland was ill and 1 participant from Slovenia didn't come without any excuse).

The distribution of countries was the following:

Austria (1), Bosnia and Herzegovina (1), Cyprus (1), Croatia (4), Hungary (1), Latvia (1), Romania (1), Serbia (1), Slovenia (1), Turkey (1).

A selection procedure was set up to come to a fair selection of participants.

The committee in charge of coming up with a final selection consisted of:

- Martina Pöll (Grant Holder)
- Andrea Mayr (Local Organiser, ZSI)
and the trainers
- Anne Katrin Werenskiold (Max Planck Institute of Biochemistry Martinsried, Germany)
- Jaco de Graaf (Leiden University Medical Center)

Interested Parties were invited via www.bestprac.eu to fill in an application form by the deadline June 20, 2016. They needed to offer information about their organisation, their personal tasks in their current position and their job profile. Furthermore, they had to describe their motivation to participate in the Training School and their expectations.

Candidates were also asked to prepare a short presentation for the Training School on the “ways of dealing with documentation of different cost categories, reportings and audits” in their organisation.

Beyond that, we prepared a short questionnaire and asked the participants in which R&D and Innovation funding programmes is their organisation already participating; with which R&D funding programmes they have personnel experience and what are the main administrative challenges for participation in R&D and Innovation funding programmes for their organisation.

Feedback of the Participants

At the end of the training school, we asked the participants to fill in questionnaires reflecting their level of satisfaction using a scale from *most satisfied/satisfied/partly satisfied/rather dissatisfied/dissatisfied* (from 1=most satisfied to 5=dissatisfied) regarding the following three main topics and subtopics:

1. CONTENT (content of the presentations; level of discussions; was the general goal achieved etc.)
2. EXPECTATIONS (personal expectations for the training school; were the above expectations met; which were not met; what did you find most useful)
3. ORGANISATION (overall organisation; communication between organisers and participants; interactivity during the workshop; time dedicated to the different topics etc.)

The average grade for the three main topics was approx. 1,3 (thus ranging between most satisfied and satisfied), details can be found below:

- Content: 1,33
- Expectations: 1,25
- Organisation of the training school: 1,32

Some suggestion and comments from the participants:

Remarks/comments to the CONTENT:

"A lot of good ideas and practical examples."

"I have learned a lot – thank you for this"

"I like the concept of the exchange mart – it is really useful"

"Thank you for all your efforts and nice attitude"

What did you find most useful?

"Hands on experience and examples discussion from other participants"

"It was nice to exchange experiences with other participants"

"Exchange mart with other participants – exchange other practice"

"Good practice exchange, audit experiences"

"Exchange mart sessions are very useful to share our experiences"

"...many examples from real project implementations"

"Communication with other participants and the trainers"

"A lot of good ideas and practical examples"

"Practical examples and models used and presented by experienced participants and lectures"

Recommendations for upcoming workshops:

"Keep on sessions with hands on experiences and examples"

"It would be nice to have other administration/project management focused trainings, either about H2020 & structural funds or also about other funds"

"More exchange marts, more interactive presentations, maybe some games"

"I have no recommendations – everything was OK"

"Thank you very much – it was a pleasure"

"Training schools can be organized as exchange offices. Some people come to offices and see the running of the project office"

"Thank you very much for the training school and I'm really looking forward to participate in another one"

Contact details

Local organiser: Andrea Mayr, Centre for Social Innovation (mayr@zsi.at)

Grant Holder (for questions on registration and reimbursement): Martina Pöll
(Martina.Poell@tuwien.ac.at)

