

**Master of Project Management
and Reporting in Horizon 2020
& Horizon Europe**

**11-13 December 2023
Vienna, Austria**

AGENDA

DAY 1

- 08:30 – 09:00** **Arrival of participants**
- 09:00 – 09:30** **Event opening and introduction**
- 09:30 – 11:00** **The legal obligations – from GA to CA**
Iasmina Cioroianu, Project Manager, Europa Media
 Understanding your obligations coming from the **Grant Agreement** and the **Consortium Agreement** is essential. This presentation will introduce those articles of the GA and sections of the CA from the project management perspective that need to be considered the most during the implementation of your projects: financial clauses, budget distribution and management, dealing with defaulting parties, ownership of the results, access rights, IPR issues, etc.
 (11:00 – 11:15 Coffee break)
- 11:15 – 12:00** **IP, Exploitation and Innovation management in running projects**
Iasmina Cioroianu
 Introduction to **innovation management** activities in Horizon Europe projects including best practices to make the most out of your project results. During this presentation we will discuss how innovation management is linked to the daily management and the reporting activities; how to follow IP development, **capture and manage results**; how to assess novelty elements and how to **decide on the best exploitation route**?
 (12:00 – 12:15 Short break)
- 12:15 – 13:00** **Open Science, Data management (DMP) and Exploitation and Dissemination of Results incl. Communication (PEDR)**
Iasmina Cioroianu
 The first deliverables you need to prepare by M6 are the DMP and the PEDR based on the draft strategies included in the proposal. Both relate to the Open Science practices presented under section 1.2 of your proposal. These are strategic, live documents, introducing all the key research data management, dissemination, exploitation and communication activities and measures planned to support the achievement of the expected outcomes and the long-term impact of the project, taking into consideration the open science principles. In this presentation, our trainers give you several **practical tips on how to build your DMP and PEDR**, what exactly to include and in what format, based on **several examples** from our projects.
 (13:00 – 14:00 Lunch break)
- 14:00 – 14:30** **The Project Handbook – tools and procedures to coordinate effectively**
Ömer Ceylan, Managing Director, Geonardo
 Having a good management system (for monitoring and reporting) supported by clear and **practical tools** will enable you to efficiently deliver your project results. We will show you the **essential tools** that we crafted **based on our extensive experience with managing projects** and various consortia: internal technical and financial report; budget spending monitoring; IP management, data management, assessing the D&C activities of the partners.
 (14:30 – 14:45 Coffee break)
- 14:45 – 15:45** **Workshop: Project Management Case Studies**
 In this day-closing session, we will go through various real-life **project management case studies** from our own projects. Together, **we will go through the scenarios and discuss how to deal with each situation** and what tools we have at our disposal as a partner or as a coordinator. Get ready for advanced scenarios!
- 15:45 – 16:00** **Q&A – End of Day 1**

AGENDA

DAY 2

08:30 – 09:00

Arrival of participants

09:00 – 10:30

Reporting from A to Z: Continuous Reporting*Ömer Ceylan*

In this session, we will introduce all the tabs of the **Horizon Europe Continuous Reporting tool** and discuss what has changed compared to H2020. Our trainers will introduce the responsibilities of the partners and the coordinator in the Continuous Reporting phase and showcase powerful **templates and tools for coordinators**. Brief intro to periodic financial reporting before we jump into the financial rules and the personnel costs calculation.

(10:30 – 10:45 Coffee break)

10:45 – 11:30

Lump sum vs. Actual cost reporting in Horizon Europe*Ömer Ceylan*

This presentation will provide a **detailed comparison** of actual cost reporting and lump sum projects, in which you do not have to report actual costs. Is this a real simplification or does it actually give us more work? We will discuss:

- Do I need any proof of costs in lump sum? Can I charge a cost if it was incurred but not budgeted?
- How to handle the timesheets of a staff member if involved in both lump sum and actual cost grants?
- Should the personnel be separated on HE projects funded lump sum and actual cost?
- Can I cross-finance an equipment from lump-sum and actual cost reimbursed projects? What kind of internal recording is needed?
- Internally invoiced goods and services – should I have two price lists?

(11:30 – 11:45 Short break)

11:45 – 13:00

Financial Rules Part 1: Direct Personnel Costs 1/2*Gábor Kitley, CEO, EMG Group***Personnel cost calculation – showing the possible ways**

In-depth introduction and analysis of all the available personnel cost calculation options in HE in comparison with H2020, focusing on the practical pros and cons. Typical mistakes and bottlenecks identified using practical examples from everyday life on employees and other employment contracts; financial year based/monthly based calculation in H2020 vs the HE daily rate calculations.

Which of the productive hour number to consider; how to harmonize measuring days (HE) and hours (H2020)? Should the hours be transformed into days?

Personnel cost calculation showcase for employees; including additional and project-based remuneration; bonuses, fringe-benefits, and other complements.

Unit-based personnel costs calculation; In-house consultants and seconded employees; SME-owner rates.

(13:00 – 14:00 Lunch break)

14:00 – 14:45

Financial Rules Part 2: Direct Personnel Costs 2/2

(14:45 – 15:00 Short break)

15:00 – 17:00

Workshop: Personnel costs calculation – Learning by doing!

Each participant will receive a package containing timesheets, payrolls, employment contracts, and other relevant documentation for several virtual employees to master the calculation of personnel costs within Horizon Europe and Horizon 2020 projects. This unique workshop will provide the participants with a comprehensive understanding of the differences between the two programmes, their respective calculation protocols, and the advantages and disadvantages of each. The goal of the workshop is to demystify the calculation of personnel costs and help participants realize that it's not as complicated as they may have initially thought.

(15:30 – 15:45 Coffee break)

17:00

Q&A – End of Day 2

AGENDA

DAY 3

08:30 – 09:00

Arrival of participants

09:00 – 11:00

Workshop Evaluation: Personnel costs calculation

Discussing and reviewing the various solutions of the Personnel Costs workshop exercise, focusing on the differences found, problems identified and potential misfits. Understanding how to integrate these experiences and protocols into the day-to-day management of HE/H2020 projects, especially during the period when projects funded from different grants are running parallel!

(11:00 – 11:30 Longer Coffee break)

11:30 – 13:00

Reporting from A to Z: Periodic Reporting – Part 1

Ömer Ceylan

Detailed introduction on how to prepare the periodic technical and financial reports: what to and how to report, irregularities and deviation management, internal quality assurance, tips and tools for effective internal management of your partners and their reporting obligations. Detailed comparison of H2020 vs Horizon Europe Periodic Reporting.

(13:00 – 14:00 Lunch break)

14:00 – 15:30

Reporting from A to Z: Periodic Reporting – Part 2 and Review meeting

Ömer Ceylan

- EU assessment of the periodic report: typical mistakes in the periodic report.
- Showcase of a real periodic report, suspension of the payment deadline letters.
- What do we have to do differently in the last reporting period? How shall we distribute the balance payment and the amount from the Guarantee Fund / Mutual Insurance Mechanism?
- At the end of this session, we will discuss the review meeting process and share some tips on how to get prepared for the review meeting.

15:30 – 16:00

Q&A – Last chance to ask questions!

16:00

End of the course