EⅢ TRAININGS

Europa Media Trainings
Online & Face-to-face training courses

Autumn 2023

I. Webinars

Lump sum proposals and projects – How do they work in practice? (0,5 day)

Available date: 3 October 2023

Lump sum funding is increasingly used in Horizon Europe to make the programme simpler by removing the need to report actual costs and reduce the financial error rate. It is meant to simplify the funding mechanism while all the main features of the research funding stay the same.

However, the details are always important; simplification comes at a price, and these are the specific extra tasks and rules that everyone applying for lump sum funding should be aware of – both when writing a proposal and implementing a project.

If you want to dig into the details of writing and managing a lump sum project, our trainers Ömer and Krisztina will help you out with pro tips and tricks on how to succeed at it based on their own experience with lump sum grants.

Over half a day, the course will cover:

Main features of lump sum funding.

- How to define the lump sum in your proposal and lump sum budget table tips to define sufficient units for your costs.

- Distribution and number of work packages in your proposal and how it is linked to the payment system of lump sum projects.

- Evaluation of the lump sum proposals.

- Grant preparation of your lump sum projects – specific articles in your Grant Agreement and tips to specify lump sum features in your Consortium Agreement.

- Changes in your lump sum project implementation – how to amend your lump sum grant?

- How to report your lump sum project, with a detailed introduction to periodic reporting.

- How to deal with partially completed work packages and how to report deviations of your lump sum projects.

Horizon Europe Proposal Writing (1-day)

Available date: 7 November 2023

This webinar will **provide a practical insight and advanced tips for writing and submitting competitive proposals** under the 2023-2024 calls of Horizon Europe. It is built on our **direct, hands-on experience** gained in developing and managing EU research and innovation projects over the past 20 years. The trainers of Europa Media are actual project managers, coordinators and financial administrators, **currently running seven Horizon Europe projects – one as coordinator – while also preparing proposals to submit** under the open and forthcoming calls of Horizon Europe. This course is designed based on this direct experience and is therefore **100% practice driven**.

In this webinar, you will learn all about the features of winning Horizon Europe proposals and get equipped with the right tools to develop your proposal and polish it to perfection. The combination of practical presentations and hands-on tips and stories will introduce all the aspects you need to know, from putting together your concept not to developing each section and sub-section of your proposal and submitting a competitive application. **We are sharing our first-hand experiences from the first submissions and evaluations. ([See here our projects](#))**

Topics covered:

- How to make sure your proposal fully matches the call text: call analysis, proposal design, consortium composition, cross-cutting issues.
- Key features of a successful Horizon Europe proposal – understand the elements that will make your proposal stand out amongst others.
- From proposal concept to full proposal: Proposal writing from the coordinators' and partner's perspective
- How to compose text and fill in the application forms: Practical tips, examples and ready-to-use templates for Excellence, Impact and Implementation
- Key steps and success criteria for winning Horizon Europe proposals: How to finalise and polish your proposal before submission
- Evaluation of horizontal aspects: how to address gender, ethics, SSH and interdisciplinary aspects of your proposal.
- Special focus: Lump sum proposals – how to design the work plan and resources, and coordinate the detailed budget preparation in lump sum grants.

II.   Face-to-face Training courses

Horizon Europe/2020 Master of Finance and Administration (3 days)

Available dates: 25-27 September 2023 in Brussels; 15-17 November 2023 in Lisbon

This **3-day exclusive training course** will assist you in gaining a comprehensive understanding of the financial regulations and reporting protocols of the Horizon Europe and Horizon 2020 programs and their practical application in day-to-day operations. Distinctions between Horizon Europe and H2020 will be emphasized, as well as their impact on internal record-keeping, planning, and bookkeeping.

Special attention will be given to the complexities of personnel cost calculation, such as daily rates, inconsistent rules, and the GA and Annotated GA descriptions. Additionally, the course will focus on internal invoicing and the calculation of research facility costs.

Agenda and topics covered:

Day 1 - *Hands-on Introduction to Horizon Europe and Horizon 2020 Financial Rules*

Attend a full-day presentation on the financial rules and reporting protocols of HE and H2020, highlighting the changes and their effects on day-to-day project management. The presentation will include numerous examples, calculations, and scenarios to help attendees understand the importance of these rules, from basic eligibility conditions to changes in personnel cost calculations and the new research facility cost criterion.

Prepare yourself, as this will be the most challenging day of the course!

Day 2 - *Workshop: Learning by Doing with Horizon Europe and Horizon 2020 Cost Reporting*

In the morning, participate in the renowned and unique workshop of Europa Media. Attendees will receive a package of timesheets, salary slips, invoices, contracts, per-diem certificates, and mission reports for a virtual HE/H2020 project. They will then have to calculate the eligible costs and submit a financial statement with comparisons to H2020 fully integrated.

In the afternoon, the group will review the most optimal solutions from the workshop exercise, delving into issues such as timesheets, personnel cost calculations, other services versus subcontracting, unforeseen costs, and deviations from the budget.

Day 3 - *Workshop: Becoming an EC Auditor for a Day*

In the morning, attendees will be divided into groups of 4-5 and receive full-project documentation (invoices, reports, timesheets, contracts, etc.). They will act as a group of auditors, recalculating the reported costs and identifying deviations, errors, and misclaimed amounts. It's much more fun to find the errors than to make them! This will also be a competition to see which group finds the most hidden things.

In the afternoon, we will assess and discuss what should have been discovered, accepted, and/or rejected, and learn about how real-life audits are conducted, what to expect from the auditors, how to prepare, and what to do if different audits have different conclusions on the same things. This will cover the full finance cycle from budgeting to audits in just 3 days!

Hottest topics covered by the course:

- Step-by-step analysis of the different personnel cost calculation protocols in H2020, compared to the new Horizon Europe program.
- How to deal with parallel running H2020/HE projects when the reporting requirements are quite different? Should you change the time-recording protocols?
- Why record time in hours if HE apparently has daily rates?
- What is a day-equivalent, and what to do when one works part-time or on sick/parental leave?
- How to optimize efforts, handle budget deviations, and monitor spending in reality?
- How to harmonize national accounting protocols with the H2020/HE Grant Agreement articles?
- Advantages and disadvantages of actual and unit-based personnel costs calculations?
- Internal cost calculation – how to make internal costs measurable, eligible for EC auditors, and still maintain sanity?

Horizon Europe Academy (5 days)

Available dates: 16-20 October 2023 in Barcelona

The Horizon Europe Academy covers the full life cycle of a research and innovation project: from proposal conceptual development to final reports and after.

- Academy Part I Horizon Europe Proposal Writing (2 days) (October 16-17)

Topics covered:

- The rationale of Horizon Europe work programmes, calls and topics: understanding the EU R&I policy context to position your project concept more competitively
- What is new in the 2023-2024 work programmes? Lump sum, blind evaluation, newest guidance documents and tools from the EC, latest statistics, etc.
- How to make sure your proposal fully matches the call text: call analysis, proposal design, consortium composition, cross-cutting issues
- Who is who in a Horizon Europe proposal? Beneficiaries, affiliated entities, associated partners, subcontractors, contractors, stakeholders, end-uses.
- Building a consortium vs. joining a consortium as a partner: step-by-step guidance
- From proposal concept to full proposal: Proposal writing from the coordinator's and partner's perspective
- How to compose text and fill in the application forms: Practical tips, examples and ready-to-use templates for Excellence, Impact and Implementation
- Key steps and success criteria for winning Horizon Europe proposals: How to finalise and polish your proposal before submission
- Evaluation of horizontal aspects: how to address gender, ethics, SSH and interdisciplinary aspects of your proposal
- Proposal Development Workshop: The afternoons in both days are dedicated to practicing actual proposal writing in response to a real Horizon Europe call. You will be able to apply this methodology to any call for your ongoing and upcoming proposals.

- Academy Part II Horizon Europe Project Management from Project Managers and Financial Reporting (4 days) (October 18-20)

Topics covered:

- How to prepare a project management driven Consortium agreement?
- Detailed discussion about result ownership and access rights in the CA;

- How is innovation management linked to the daily management and the reporting activities?
- How to follow IP development, capture and manage results; assess novelty elements and how to decide on the best exploitation route.
- Practice-based tips on how to build and what exactly to include into your PEDR - Plan for Exploitation and Dissemination of Results including Communication activities?
- Deep dive into EC services to boost your dissemination and exploitation efforts.
- Step-by step introduction to the Horizon Europe Continuous Reporting tool
- When and how the internal reporting should be completed to be able to identify "problems".
- Periodic technical and financial reporting from A-Z
- Step-by-step analysis of the different personnel cost calculation protocols in Horizon Europe program.
- How to deal with parallel running H2020/HE projects when the reporting requirements are quite different? Should you change the time-recording protocols?
- Why record time in hours if HE apparently has daily rates?
- What is a day-equivalent, and what to do when one works part-time or on sick/parental leave?
- How to optimize efforts, handle budget deviations, and monitor spending in reality?
- How to harmonize national accounting protocols with the HE Grant Agreement articles?
- Internal cost calculation – how to make internal costs measurable, eligible for EC auditors, and still maintain sanity?
- Financial management of lump sum projects behind the scenes: is it really that simple? What if you have both a lump sum and an action grant project?
- ...and many more!

Horizon Europe Project Management and Financial Reporting – (3 days)

Available date: 11-13 December 2023 in Vienna

We dedicate **three full days** to introducing the **project management novelties** and the **financial reporting rules of Horizon Europe projects**. We will provide real-life examples, and stories, and explain the calculation methods.

What is new in the legal agreements, how to handle open science or intellectual property, and what are the new dissemination and exploitation obligations? How to figure out what is eligible and what is not, and how that helps you to develop your budget or report your costs?

Answers to these questions will ease your project management journey while preparing your periodic technical and financial report for the EC accurately!

Presentations will be complemented by **practical tips**, **personal experiences, good and bad practices**, allowing the participants to fully understand the key processes and steps in proposal preparation from a practitioner's perspective. Hands-on workshops will complement presentations, giving participants the opportunity to fully experience project implementation, including financial management and reporting.