

Horizon Europe Academy

7-11 October 2024
Lisbon, Portugal

AGENDA

DAY 1

- 08:45 – 09:00** **Arrival and registration**
- 09:00 – 09:30** **Event opening and introduction to the course**
- 09:30 – 10:30** **Introduction to Proposal Development under Horizon Europe**
- General principles and features of HE proposals – understanding and tailoring your proposal appropriately to the EU R&I context
 - Work programmes, calls and topics in 2025-2027 – budgets, deadlines, submission processes, novelties (blind evaluation, lump sum funding, etc.)
 - Types of actions (RIA, IA, CSA) and TRLs – positioning your proposal effectively
 - First steps of proposal preparation: identifying the right call, call analysis, proposal abstract, background research, consortium building
- (10:30 – 10:45 Coffee break)*
- 10:30 – 11:30** **From idea to Horizon Europe proposal – A hands-on approach (Part 1)**
- How to turn your novel idea into a winning concept
 - Drafting the Part A and Part B of the proposal
 - Excellence – Examples, tips and ready-to-use templates for section 1.1. and 1.2 of the Part B of the proposal: Objectives, Ambition, Methodology, Knowledge Management from of the proposal with lessons learned from evaluations
- (11:30 – 11:45 Break)*
- 11:45 – 12:30** **From idea to Horizon Europe proposal – A hands-on approach (Part 2)**
- Implementation – Examples, tips and templates from section 3.1. and 3.2 of the Part B of the proposal with lessons learned from evaluations
 - Tips to design the work plan effectively for lump sum grants
 - How to develop a sound work plan, and consortium as a whole considerations
- (12:30 – 13:30 Lunch break)*
- 13:30 – 16:00** **Proposal Development Workshop: Call analysis, Objectives, Work plan**
- Participants are divided into small groups to practice the first steps of proposal development under Horizon Europe:
- Call analysis
 - Consortium building considerations
 - Proposal objectives and SMART considerations
 - How to distinguish activities from objectives and vice-versa
 - Methodology, work packages and deliverables
 - PERT diagram and milestones
- (14:30 – 14:45 Coffee break)*
- 16:00** **Wrap-up and end of first day**

AGENDA**DAY 2****09:00 – 10:00****Expected Impact in Horizon Europe Proposals**

- Impact in HE proposals – examples of different approaches to addressing the “Expected Impact” of your proposals, lessons learned from evaluations
- Impact in RIAs, IAs and CSAs – how to position your innovation from RTD to market uptake, Dos and Don'ts
- Impact indicators and Impact assessment methodologies
- Barriers to achieving the Expected Impact – Types of barriers

*(10:00 – 10:15 Coffee break)***10:15 – 11:30****Measures to Maximise Impact in Horizon Europe proposals**

- How to identify and select the best exploitation, IP and innovation strategy to maximise the potential impact of your HE project
- Exploitation and sustainability – examples of project and partner level approaches and routes
- How to tailor an effective dissemination and communication plan to maximise the potential impact of your HE project
- Tools, measures, strategies and channels to reach your target group and communicate the right message in the right way with the right KPIs
- Policy feedback and the Impact Canvas (2.3)
- New requirements of the EC, legal obligations according to the HE GA

*(11:30 – 11:45 Break)***11:45 – 12:30****Evaluation of Proposals under Horizon Europe**

- What happens after you submit your proposal?
- Admissibility and eligibility check – standard rules and exceptions
- Evaluation process: individual assessment, consensus meeting, final ranking – understanding the dynamics to finetune your proposal
- Experiences and lessons learned from Evaluation Summary Reports (ESRs)
- Step-by-step guide to registering as an independent expert to evaluate Horizon Europe proposals

*(12:30 – 13:30 Lunch break)***13:30 – 16:00****Proposal Development Workshop: Impact, Exploitation, Dissemination & Communication**

- How the project will contribute to each of the expected outcomes and impact mentioned in the work programme
- Exploitable results and the potential exploitation strategies – how to transform this into a “plan”
- Defining the most appropriate target groups, tools and channels for dissemination and communication

*(14:45 – 15:00 Break)***16:00****Wrap-up and end of course**

AGENDA

DAY 3

- 08:30 – 09:00** **Arrival of new participants**
- 09:00 – 09:30** **Event Opening and introduction**
- 09:30 – 10:45** **The legal obligations – from GA to CA**

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: such as financial clauses, budget distribution and management, dealing with defaulting parties, ownership of the results, access rights, IPR issues etc. We will also deep dive into the **new lump sum articles of the DESCA 2.0**

(10:45 – 11:00 Coffee break)

- 11:00 – 12:15** **Dissemination, Exploitation and Communication in running projects**

This comprehensive presentation will cover all aspects of the dissemination, communication and exploitation in Horizon Europe. In this presentation, we will give you several **practice-based tips on how to build your DMP (Data Management Plan) and PEDR (Plan for exploitation and dissemination of the results)**, what exactly to include and in what format. These are strategic, live documents, introducing all the key research data management, dissemination, exploitation and communication, taking into consideration the open science principles. Our trainers will also show you **several examples** from our own projects **and templates and tools** that we crafted **based on our extensive experience with managing projects** and various consortia.

During this presentation we will discuss in detail the daily exploitation activities 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?**

(12:15– 12:30 Short break)

- 12:30 – 13:30** **Reporting from A to Z – Actual cost grants: Continuous Reporting**

In this session, we will introduce all tabs of **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 and showcase powerful **templates and tools for coordinators**. Brief intro to Periodic Financial reporting before we jump into the financial rules and the personnel cost calculation.

(13:30 – 14:30 Lunch break)

14:30– 15:45

Internal technical and financial reporting – tool to monitor the performance of your partners

This presentation will introduce different internal technical and financial reporting practices and templates. After a short introduction to internal reporting participants will solve an exercise.

Workshop: Typical mistakes in the financial report in Horizon Europe

Participants will look for typical errors and calculation mistakes in an internal financial report.

(15:45 – 16:00 Short break)

16:00 – 16:30

Workshop: Project Management Case Studies

In this day-closing session, we will go through various **project management cases** that have happened in our own projects. Together **we will go through the scenarios and discuss how to deal with such situation** and what tools we have at our disposal as a partner or as a coordinator. Get ready for advanced scenarios!

16:30

Q&A – End of Day 3

08:30 – 09:00**Arrival of participants****09:00 – 10:30****Project management and reporting of lump sum projects**

Detailed introduction to the reporting duties in a lump sum project. How to report the **completion of the work packages** and describe the activities in the periodic technical report. Our experts will showcase practical tips on how to deal with **partially completed work packages** and how to report deviations in your lump sum projects? We will discuss what should an **effective monitoring system** should include in a lump sum project? **Payment schedule**, partial payment, record keeping and many more will be covered in this practical presentation.

(10:30 – 10:45 Coffee break)

10:45 – 13:00**Financial Rules Part 2: Direct Personnel Costs Part 1.****Personnel cost calculation – showing all the possible ways!**

In-depth introduction and analysis of all the available personnel cost calculation options in Horizon Europe in comparison with H2020, focusing on the practicalities.

Typical mistakes and backbones of the actual personnel cost calculation and reporting – should we choose the default reporting period based or the alternative “calendar-year” based option? What are the pros and cons and the dos and don'ts of the calculations?

- Are your actual costs deviated from the ones budgeted or planned?
- Are you getting confused about the multiple calculation options and categories?
- Are you dealing with staff leaving and coming, parental leaves or additional staff benefits?

(12:00– 12:15 Short break)

Which of the productive-hour number to consider; how to harmonize measuring days (HE) with 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, including the brand new unit cost for personnel; In-house consultants and seconded employees; SME-owner rates.

(13:00 – 14:00 Lunch break)

14:00 – 14:30**Financial Rules Part 2: Direct Personnel Costs 2/2**

(14:30 – 14:45 Short break)

14:45 – 17:00

Workshop: Personnel cost 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 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 4

DAY 5**08:30 – 09:00** **Arrival of participants****09:00 – 11:00** **Workshop Evaluation: Personnel cost calculation**

Discussing and reviewing the various solutions of the Personnel Cost 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 – Actual cost grants: Periodic Reporting Part 1**

Detailed introduction on how to prepare the periodic technical and financial reports of your actual cost grant: 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. Comparison of H2020 vs Horizon Europe Periodic Reporting.

(13:00 – 14:00 Lunch break)

14:00 – 15:30 **Reporting from A to Z – Actual cost grants: Periodic Reporting and Review meeting**

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

15:30 – 16:00 **Q&A – Last chance to ask questions!****16:00** **End of the course**