

Horizon Europe Academy Part II.

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

**9-11 October 2024
Lisbon, Portugal**

AGENDA

DAY 1

- 08:30 – 09:00** **Arrival of 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 1

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 2

DAY 3**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**