

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

**Horizon Europe Academy – Part II.
19-21 June 2024
Barcelona, Spain**

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**
Jelena Kajganovic, Senior Project Manager, Geonardo Ltd.
 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.
 (10:45 – 11:00 Coffee break)
- 11:00– 13:00** **Financial Rules Part 2: Direct Personnel Costs ½**
Gabor Kitley, CEO, EMG Group Plc.
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**
Gabor Kitley, CEO, EMG Group Plc.
 (14:45 – 15:00 Short break)
- 15:00 – 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)

AGENDA**DAY 2****09:00 – 10:45****Workshop Evaluation: Personnel cost calculation***Gabor Kitley, CEO, EMG Group Plc.*

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!

(10:45 – 11:15 Longer Coffee break)

11:15 – 12:00**IP, Exploitation and Innovation management in running projects***Jelena Kajganovic, Senior Project Manager, Geonardo Ltd.*

Introduction to the **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 inc. Communication (PEDR)***Krisztina Toth, Managing Director, Europa Media Trainings Ltd.*

The first deliverables you need to prepare by M6 is the DMP and the PEDR based on the draft strategies included in the proposal. Both relate to your 1.2 section in the proposal on open science. 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 **practice-based tips on how to build your DMP and PEDR**, what exactly to include and in what format. Our trainers will also show you **several examples** from their own projects.

(13:00 – 14:00 Lunch break)

14:00 – 14:30**The Project Handbook - tools and procedures to coordinate properly***Jelena Kajganovic, Senior Project Manager, Geonardo Ltd.*

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 Short break)

14:45 – 15:45

Workshop: Project Management Case Studies

Krisztina Toth, Managing Director, Europa Media Trainings Ltd.

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!

15:45 – 16:00

Q&A – End of Day 2

AGENDA

DAY 3

08:30 – 09:00

Arrival of participants

09:00 – 10:00

Reporting from A to Z: Continuous Reporting

Jelena Kajganovic, Senior Project Manager, Geonardo Ltd.

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.

(10:00 – 10:15 Short break)

10:15 – 11:15

Project management and reporting of lump sum projects

Krisztina Toth, Managing Director, Europa Media Trainings Ltd.

This presentation will **provide a detailed introduction to the reporting duties in a lump sum project**. We will discuss:

- How to report the completion of the work packages and describe the activities in the periodic technical report.
- 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 include in a lump sum project?
- Payment schedule, partial payment, record keeping and many more will be covered in this practical presentation.

(11:15 – 11:45 Longer coffee break)

11:45 – 13:00

Reporting from A to Z: Periodic Reporting Part 1

Krisztina Toth, Managing Director, Europa Media Trainings Ltd.

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

Krisztina Toth, Managing Director, Europa Media Trainings Ltd.

- EU assessment of the periodic report: typical mistakes in the periodic report.
- Showcase of a real periodic, 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 the Guarantee Fund / 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