# HORIZON EUROPE PROJECT DEVELOPMENT AND MANAGEMENT - Junior edition

Face-to-face course

28-30 September 2022

Budapest, Graphisoft park

## Discussion Topics

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| **09:00 – 09:15** | **Registration** |
| **09:15 – 09:45** | **Event Opening** |
| **09:45 – 10:15** | **What makes a Horizon Europe proposal successful** |

- Introduction to the key success features of EU research and innovation projects.
- What are the steps, what are the tasks and responsibilities of a partner and the coordinating organisation? Best and worst practices will help highlighting how a successful or bad project looks like.

*(10:15 – 10:25 Short Break)*

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| **10:25 – 11:15** | **Building a winning consortium or joining one** |

- Build the most suitable Consortium for your next EU project.
- What are the key aspects to consider while building up your partnership?
- Your tools to find the right partners: searching facilities, networks, events and more.
- Maintaining partnerships and connections in the long run.
- Tips on networking events and virtual networking to be prepared in these times.
- Understand the winning consortium characteristics in Horizon Europe.

*(11:15 – 11:30 Coffee Break)*

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| **11:30 – 12:15** | **Key steps in proposal writing** |

- Introduction to the Funding and Tenders Portal
- Proposal writing steps – key elements, templates to consider – what to discuss and when. Intro to the tools and procedures set up by the European Commission.

*(12:15 – 13:00 Lunch break)*

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| **13:00 – 13:30** | **How to smoothly Lead a proposal to submission?** |

- How to distribute the writing of the proposal amongst the key partners
- How to effectively mobilise your partners to unleash their full potential in terms of their input to the proposal and mobilisation of their resources
- What are the key proposal sections that require input to be gathered and consolidated from all partners?
- How to make sure that your partners provide you with accurate data and input for the budget

*(13:30 – 13:40 Technical break)*

**13:40 – 14:50**          **Exercise: Practicing the very basic tools**

- Under the moderation of trainers, participants work in groups on putting together work packages, Gantt charts, pert diagrams – understand the concept development procedure.

**14:50 – 15:00**          **Remaining questions, end of course**

# DAY 2.

**08:45 – 09:00**          **Arrival of participants**

**09:00 – 10:00**          **Introduction to Finances in Horizon Europe – Part I**

- Key principles of EU funding for R&I projects
- Overview of the Annotated Model Grant Agreement
- Grant types and funding rules
- Importance of budgeting

*(10:00 – 10:15 Coffee break)*

**10:15 – 11:00**          **Introduction to Finances in Horizon Europe – Part II**

- Fundamentals of financial management in R&I projects
- Eligibility rules
- Direct and Indirect cost
- Introduction to the major cost categories in an R&I project budget

*(11:00 – 11:15 Coffee break)*

**11:15 – 12:00**          **Resource Planning and Budgeting in H2020 Proposals**

- Proposal budget vs. project spending
- Estimating costs: Personnel, travel, subcontracting and other direct costs
- Coordinators vs. partners in budget planning
- Resource planning and budgeting tools
- Examples of budgeting process in small/medium vs. large-scale projects

*(12:00 – 13:00 Lunch)*

**13:00 – 15:00**          **Workshop: Resource Planning and Budgeting in HE Proposals**

- Participants will go through exercises to estimate their budget for a virtual proposal in which they are a partner. They will have to calculate their person-month rate correctly, estimate other direct costs such as travel, consumables, equipment, subcontracting, and demonstrate how their technical role and planned activities in the project are consistent with their planned resources and budget.

*(14:00 – 14:15 Coffee break)*

**15:00**          **End of day**

**08:45 – 09:00**          **Arrival of participants**

**09:00– 10:00**          **An EU project lifecycle**

- Introduction to the implementation stages of an EU research and innovation project.
- What are the steps, what are the tasks and responsibilities of a partner and the coordinating organisation?
- Best and worst practices will help highlighting how a successful or bad project looks like.

*(10:00 – 10:15 Short Break)*

**10:15 – 11:00**          **Getting your project started**

- Key tasks, tools, and procedures you need to know before you start implementing the project – on an organisational level (formulate the work and roles internally) and on a consortium level (what would make you a good coordinator).
- Setting up the project management tools – a web platform or a package of Word and Excel templates?
- Web-based communication, telcos or f2f events? How many, how often?
- Basic templates for monitoring the performance of your consortium.
- Kick off meeting.

*(11:00 – 11:15 Coffee Break)*

**11:15 – 12:15**          **Short introduction to the reporting obligations and management duties**

- Brief overview of Continuous reporting and Periodic reporting: timeline, responsibilities, task to be completed jointly or individually.
- Introduction to the Periodic report template. Payment schedule.

*(12:15 – 13:00 Lunch break)*

**13:00 – 14:00**          **Workshop: Project Management Case Studies**

- Under the moderation of trainers, participants work in groups on real-life scenarios with problematic and challenging situations in R&I projects and discuss how to handle these or avoid them in real life.

*(14:00 – 14:10 Short Break)*

**14:00 – 15:00**          **Golden tips for successful communication and dissemination**

- Tips and tools for setting up an efficient plan and successfully implementing your communication and dissemination activities.
- Examples and lessons learned from our running projects. Introduction to the tools offered by the EC.

**15:00**          **Remaining questions, end of course**