Horizon Europe Funding Academy
Online

Horizon Europe

**Proposal Writing
Project Management & Financial
Rules&Reporting**

Horizon Europe Proposal Writing

7-8 June 2022

08:45 – 09:00 **Accessing the ZOOM online meeting room**

09:00 – 09:15 **Event opening and introduction to the course**

09:15 – 10:00 **Introduction to Proposal Development under Horizon Europe**
Work programmes, calls and topics – budgets, deadlines, submission processes

- General principles and features of HE proposals – understanding and tailoring your proposal appropriately to the EU R&I context
- 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

(10:00 – 10:15 break)

10:15 – 11:00 **From idea to Horizon Europe proposal – A hands-on approach (Part 1)**
- How to turn your novel idea into a winning concept
- Drafting Part A and Part B of the proposal
- Excellence – Examples, tips and templates from section 1.1. and 1.2 of the Part B of the proposal with lessons learned from evaluations

(11:00 – 11:15 Coffee break)

11:15 – 12:00 **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
- How to develop a sound work plan, and consortium as a whole considerations

(12:00 – 12:45 Lunch break)

12:45 – 15:45 **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

- Work packages and deliverables

- PERT diagram and milestones

(14:00 – 14:15 Coffee break)

15:45 **Wrap-up and end of first day**

EM TRAININGS

09:00 – 09:45   **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

(09:45 – 10:00 Coffee break)

10:00 – 10:45   **Impact, Innovation and Exploitation 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
- Business plans, market uptake strategies
- Exploitation and sustainability – examples of project and partner level approaches and routes
- Pre-proposal and proposal-stage agreements and tools for consortia

(10:45 – 11:00 Coffee break)

11:00 – 11:45   **Dissemination & Communication in Horizon Europe proposals**
- 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
- Policy feedback and the impact canvas (2.3)
- New requirements of the EC, legal obligations according to the HE GA

(11:45 – 12:30 Lunch break)

12:30 – 15:00   **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

(13:45 – 14:00 Coffee break)

15:00   **Wrap-up and end of course**

R&I Project Management, Financial Rules & Reporting

9-10 June 2022

AGENDA

08:30 – 09:00	**Arrival of participants**
09:00 – 09:15	**Event Opening and introduction to the course**
09:15 – 10:15	**The legal obligations – from the GA to the CA**

Understanding your obligations coming from the Grant Agreement and the Consortium Agreement is the essential first step before your project starts. This presentation will introduce those articles of the GA and sections of the CA that need to be considered the most during the implementation of your projects: financial clauses, budget distribution and management. Defining Background, Results and IPR issues.

(10:15 – 10:25 Short Break)

10:25 – 11:15	**Project management novelties in Horizon Europe**

Overview of all the novelties a proposal writer should be aware of: new reporting responsibilities, dissemination and exploitation, data management and open access. Introduction to the new Model Grant Agreement and the services provided by the EC (Horizon Results Platform, IP Booster, Dissemination and Communication Booster, etc) and major changes in finances.

(11:15– 11:30 Break for a coffee)

11:30 – 12:15	**Open science and data management**

- How to follow IP development? Capture and manage results – then exploit
- How to follow the market?
- Assess novelty element and innovation deployment potential
- Patenting and patentability
- Legal agreements – what is needed? What is useful?
- What will the reviewers look for?

(12:15 – 13:15 Lunch break)

13:15 – 14:15	**Hitchhiker's Guide to the Financial Rules Part 1: Warming Up**

Detailed introduction to the financial rules of Horizon Europe and H2020 with real-life examples:

- Basic facts – funding schemes: cost reporting vs lump-sum funding
- Importance of the budget and of the resources considering reporting
- Basic financial principles in theory and practice
- Form of Grants, Forms of Costs
- Eligible and non-eligible costs with comparison and all exceptions
- Direct and indirect costs

(14:15 – 14:30 Coffee break)

14:45 – 15:45	**Hitchhiker's Guide to the Financial Rules Part 2: Direct Personnel Costs**

- Introducing the cost categories Changes of cost categories in Horizon Europe
- Personnel costs calculations – showing the possible ways:
- Employees and other employment contracts
- Financial year based vs monthly calculation vs daily rate calculation
- Number of productive hours to consider
- Measuring days (HE) and hours (H2020) – how to handle?
- Transforming hours into days?

15:45 - 16:00   **FAQ, End of course**

AGENDA   **DAY 2**

9:00 – 10:00   **Hitchhiker's Guide to the Financial Rules Part 3: Direct Personnel Costs**

- Personnel cost calculation showcase for employees – how to maximise costs?
- Additional and project-based remuneration
- Bonuses, fringe-benefits, and other complements
- Unit-based personnel costs calculation
- Missing resources in personnel? - In-house consultants and seconded employees
- SME-owner rates

(10:00 – 10:15 Break)

10:15 – 11:30   **Hitchhiker's Guide to the Financial Rules Part 4: Subcontracting and Purchase costs, Research facility costs**

- Subcontracting and other third parties – what is what?; Special third-party protocols
- Purchase costs vs. Other direct costs – what's the difference?
- Travel costs – what to consider?
- Consumables and small services
- Equipment and assets – calculating the costs of the research infrastructure
- Internally invoiced items

(11:30 – 11:45 One last coffee to survive….)

11:45 – 12:30   **Hitchhiker's Guide to the Financial Rules Part 5**

- Indirect costs – does it need to be proved?
- Funding Rates and Receipt calculations
- Certificates on Financial Statements, Certificate on Methodology, etc. System and Process Audits
- Guarantee Fund vs Mutual Insurance Mechanism; Payments and Exchange rates

Lunch

12:30 – 14:00   **Workshop – Financial Reporting of Horizon projects**

Introduction - Participants will prepare a financial statement for a virtual Horizon Europe project, based on "mock-up" invoices, salary slips, receipts and bills, time records and certificates, which are generated individually for each participant. The full package will be downloadable or sent to the participants on Day1 and shall be solved individually as homework.

14:00 – 15:45   **Understanding the Financial Reports**

Pragmatic approaches in reporting; Point-by-point assessment of the prepared financial reports: Format, content; overall principles, possible bottlenecks, what should and should not be included.

Showing the effect of different calculation protocols on personnel costs (employees), pros and cons of the different approaches

End of course