

European Funding Academy *Online*

Horizon Europe

Proposal Writing

Project Management

Financial Rules

Innovation in proposals, projects and
organisations

Fully online:

live webinars complemented with eLearning
and live Q&A sessions

Horizon Europe - Proposal Writing

16 - 17 March 2021

Mandatory module before the webinar

Are you completely new to proposal writing under research and innovation programmes?

Don't worry, all participants will have the opportunity to prepare and get ready well in advance with our brand-new **Webinar 0**. This introductory module, in eLearning format, will help you refresh your knowledge or learn some basic information on Horizon Europe proposal development if you are a newbie in this field.

Webinar 0: 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 fitting 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

Discussion Topics

DAY 1

- 08:45 - 09:00 Accessing the webinar room
- 09:00 - 09:15 Event opening and introduction to the webinar
- 09:15 - 09:45 **From idea to a Horizon Europe proposal**
- Key changes in Horizon Europe - starting with your mindset
 - How to turn your novel idea into a winning concept
 - From call analysis to submission
 - What can go wrong during proposal development? How to avoid and handle problems.
 - Consortium building challenges
- 09:45 - 10:00 Coffee Break
- 10:00 - 11:30 **Excellence and Implementation - practical tips**
- Proposal writing section-by-section - Examples, tips and templates from section 1.1. until 5.2 of the Part B of the proposal
 - How to address objectives and activities, develop a sound work plan, and consortium as a whole considerations.
 - Knowledge management, Open Access, Open Data

Afternoon - do the exercises on the eLearning portal at your own speed.
1-hour live Q&A session with the experts will be held at 14:00.

Discussion Topics

DAY 2

09:00 - 09:10

Accessing the webinar room

09:10 - 10:20

Impact

- Impact in HEU proposals - examples of different approaches to addressing the “Impact” and “Expected Outcome” of your proposals, along the Key Impact Pathways (KIPs)
- 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, Barriers vs. Risks.

10:20 - 10:35

Coffee Break

10:35 - 12:00

Section 2.2 - Measures to maximise impact

- 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
- Pre-proposal and proposal-stage legal agreements for consortia
- 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 - new requirements to be incorporated.

Do the remaining exercises on the eLearning portal at your own speed.
1-hour live Q&A session with the experts will be held at 14:00.

Horizon Europe - Project Management

18 - 19 March 2021

Mandatory module before the webinar

Don't worry; all participants will have the opportunity to prepare and get ready well in advance with this preliminary chapter. This introductory course, in eLearning format, will help you refresh your knowledge on project management and coordination.

How to Coordinate and Manage your R&I Project?

Discover the tried and tested tools and methodologies from our team: essential project management and coordination tools and tips; dealing with partners; tools that will help to motivate and monitor your team; legal and administrative obligations; possible administrative and technical bottlenecks, legal problems.

Discussion Topics

DAY 1

08:45 - 09:00	Accessing the webinar room
09:00 - 09:15	Event opening and introduction to the webinar
09:15 - 10:15	<p>Grant Agreement and the Consortium Agreement</p> <p>Short introduction to legal agreements. Non-Disclosure Agreements; Letters of Intent; Memoranda of Understanding; Letters of Commitment. Subcontracting and Third-Party Agreements. Grant Agreement - what are the rights and obligations you are committing to? Consortium Agreement: what and how to include; decision making procedures, obligations and rights, financial issues and managing task and budget reallocations. Tips - what to include and how? Amending a Grant Agreement - when and how?</p>
10:15 - 10:30	Coffee Break
10:30 - 11:15	<p>Essential tools and “weapons” of a top-notch coordinator</p> <p>Having a good management system supported by clear and practical tools will enable you to efficiently develop your project results. We will show you the most essential tools that we crafted based on our extensive experience with managing projects and various consortiums: Organise a good kick-off meeting; Internal technical and financial report; Budget monitoring; IP management, Data management, assessing the D&C activities of the partners.</p>
11:15- 11:30	Break for a coffee, late breakfast or other
11:30 - 12:15	<p>Communication and Dissemination: Things you wish you had known before the first periodic report.</p> <p>What does a communication manager need to effectively support the project activities? How can we set up a good communication plan & make the partners part of it from the beginning? At proposal stage, understand how to select the right KPIs and stick to them along the way (unless reviewers change their mind!). Agree with partners how to collect their C&D numbers across the project and avoid last-minute confusion. Let’s look at how to fill out the Dissemination table on the EU portal. Be ready for tweaks and changes in the Communication strategy and learn to anticipate reviewers’ suggestions.</p>

Do the exercises on the eLearning portal at your own speed.
1-hour live Q&A session with the experts will be held at 14:00.

Discussion Topics

DAY 2

09:00 - 09:10 Accessing the webinar room

09:10 - 11:30 **Reporting obligations: Continuous reporting, Periodic Report, Final Report, Review meeting in Horizon Europe vs H2020**

In this session, we will introduce the main steps and the responsibilities of the partners in the continuous reporting. We will discuss when and how the internal reporting should be completed to be able to identify “problems”. Let’s discover together how to prepare the periodic technical and financial reports: what to and how to report, irregularities and deviation management, internal quality assurance, tips for effective internal management of your partners and their reporting obligations.

EU assessment of the periodic report: typical mistakes in the periodic report. Showcase of a real H2020, suspension of the payment letters. In this presentation, we will give you tips on how to be prepared for the review meeting.

Changes in Project Management: brief introduction to the Mutual Insurance Mechanism, novelties in Horizon Europe reporting, new exploitation obligations.

A break will be integrated.

10:15 - 10:30 - Coffee Break

Do the remaining exercises on the eLearning portal at your own speed.
1-hour live Q&A session with the experts will be held at 14:00.

Horizon Europe - Financial rules (vs. H2020)

22-23 March 2021

Mandatory module before the webinar

Are you new to financial management of R&I projects? Or are you well-experienced?

We will introduce the essentials of finances in H2020/HE to make sure you get things right from the very beginning. This homework is highly recommended for all participants.

Topics covered:

- How to harmonise national accounting protocols with the H2020/HE Grant Agreement articles
- Budgeting and planning: Why is it the most crucial part?
- What is a cost reimbursement? What is lump sum financing?
- Actual costs and unit costs? Which one should I choose?
- What makes any cost eligible? How to make them eligible?
- Linking a cost to the project? What makes them direct costs?
- Can I report indirect costs? If not, why not?

Discussion Topics

DAY 1

08:45 - 09:00	Accessing the webinar room
09:00 - 09:15	Event opening and introduction to the webinar
09:15 - 10:00	Hitchhiker's Guide to the Financial Rules of H2020 and HE Personnel Costs - Part I <ul style="list-style-type: none">• Personnel costs calculations - showing the possible ways:• Employees and other employment contracts• Financial-year based vs monthly-based calculation• Daily rate calculation in HE• Number of productive hours to consider• Calculation methods for productive days from hours
10:00 - 10:15	Break for a coffee
10:15 - 11:00	Hitchhiker's Guide to the Financial Rules of H2020 and HE Personnel Costs - Part II: <ul style="list-style-type: none">• Additional remuneration• Project-based remuneration in HE• Bonuses, fringe-benefits, and other complements• Unit-based personnel costs calculation• In-house consultants and seconded employees• SME-owner rates
11:00 - 11:15	Break for one more coffee
11:15 - 12:00	Hitchhiker's Guide to the Financial Rules of H2020 and HE Subcontracting/Third parties/Other costs <ul style="list-style-type: none">• Subcontracting and other third parties• Travel costs, Consumables vs. Overheads• Equipment and assets• Internally invoiced items in H2020 and in HE• Indirect costs calculation
12:00 - 12:15	One last coffee to survive...

- 12:15 - 13:00** **Hitchhiker's Guide to the Financial Rules of Horizon 2020 - Remaining issues ...**
- Funding Rates
 - Receipt calculations
 - Guarantee Fund vs Mutual Insurance Mechanism
 - Certificates on Financial Statements, Certificate on Methodology, etc.
 - Payments and Exchange rates

13:00 - 14:00 Finally...lunch break

Workshop from 14:00 on, during the afternoon

Participate in our virtual exercise on cost reporting to Horizon 2020/Horizon Europe projects, and experience the importance of the grey zones!

Introduction - Participants will prepare a financial statement for a virtual Horizon 2020 project, based on “dummy” 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 and shall be solved individually as homework.

Online assistance will be provided between 14:00 - 16:00

Discussion Topics

DAY 2

08:45 - 09:00	Accessing the webinar room
09:00 - 10:30	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.
10:30 - 10:45	Break for a coffee
10:45 - 11:30	How to deal with Financial issues in the Periodic Reports Step-by-step guide on how to report costs, deal with deviations, and internal allocation issues. Handling the EC requests for clarification, suspension of payments and other issues with hands-on approach.
11:30 - 11:45	Break for a coffee
11:45 - 12:30	EC Financial Audits in theory and in practice What is a System Process Audit? Discover how to avoid errors in the financial administration and reporting of your H2020/HE project; and about the typical mistakes and systematic errors in personnel costs that may lead to significant losses. Understand the processes before, during and after of EC financial audits; and get an insight to the on-site audit process and to managing it successfully
12:30	End of webinar

Horizon Europe - Innovation in proposals, projects and organisations

25 March 2021

Mandatory module before the webinar

This introductory module, in eLearning format, will help you understand the innovation agenda and all the definitions related to innovation. Let's discover together the EIC schemes and how Horizon Europe will support and fund innovations.

Discover about innovation:

- Open
- Social
- Sustainable
- Disruptive
- Breakthrough.

Discussion Topics

DAY 1

08:45 - 09:00 **Accessing the webinar room**

09:00 - 09:15 **Event opening and introduction to the webinar**

09:15 - 10:15 **Innovation in Horizon Europe proposals**

Going through a proposal template, using innovation indicators we will discover what to consider and in which proposal section.

- How to describe innovation management structure
- Innovation management task and deliverables
- Budgetary aspects
- Exploitation management vs. innovation management
- Lean canvas method
- Commercialisation (Licencing, joint ventures, spin-offs, etc.)
- Non-commercial exploitation routes
- What will the evaluators look for?

10:15 - 10:30 **Technical break**

10:30 - 11:30 **Innovation management in running projects**

Based on examples from H2020 projects, we help you set-up the innovation management in Horizon Europe projects.

- 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?

11:30 - 11:40 **Technical break**

11:40 - 12:00 **Innovation management on organisational level**

How to prepare your organisation to be able to support innovation - inside and outside research and innovation projects.

- Innovation management systems and tools at universities and research organisations
- Consortium Agreement articles; joint ownership agreements, licencing agreements

Do the quiz on the eLearning portal at your own speed.
1-hour live Q&A session with the experts will be held at 14:00. During this session the **best practices, examples** from 4 different organisations will be discussed.