

European Funding Academy

Online

Horizon Europe

Proposal Writing
Project Management
Budget development & financial rules

Fully online:

live webinars complemented with eLearning
and live Q&A sessions

Horizon Europe Proposal Writing

17 - 18 March 2022

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 **Introduction to Horizon Europe proposal writing** video explaining the approach and the first steps.

This introductory module – part of the eLearning chapters - will help you refresh your knowledge or learn some basic information on Horizon Europe proposal development if you are a newbie in this field:

Introduction to Proposal Development under Horizon Europe (video)

- 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 - 09:30

Networking session

09:30 – 10:15

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

10:15 – 10:30

Coffee Break

10:30 – 11:45

Excellence and Implementation – practical tips

- Proposal writing section-by-section – Examples, tips and templates from section 1.1. until 3.2 of the Part B of the proposal
- How to address objectives and activities, develop a sound work plan, and consortium as a whole
- Knowledge management, Open Access, Open Data

Afternoon

Do the exercises on the eLearning portal at your own speed.

14:00 - 15:00

Live Q&A session with the experts

Discussion Topics

DAY 2

09:00 – 09:10 Accessing the webinar room

09:10 – 10:20 **Section 2.1 Impact**

- Impact in HE 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

22 - 23 March 2022

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

Grant Agreement and the Consortium Agreement

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?

10:15 – 10:30

Coffee Break

10:30 – 11:15

Essential tools and “weapons” of a top-notch coordinator

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.

11:15 – 11:30

Break for a coffee, late breakfast or other

11:30 – 12:15

Project Management case studies

How to deal with a non-performing partner? How to handle serious delays affecting many activities? How to work with the Project Officer? What happens that no matter how much you warned your partners to carefully plan their budget – they still underspend or overspend it significantly? What does a communication manager need to effectively support the project activities? AND many other questions will be discussed through a series of case studies.

Afternoon

Do the exercises on the eLearning portal at your own speed.

14:00 - 15:00

Live Q&A session with the experts

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: full introduction to the novelties in Horizon Europe reporting, new exploitation, dissemination obligations, etc.

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.

Budget development and financial reporting in Horizon Europe

24 March 2022

Mandatory module before the webinar

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

In this **introductory video** – part of the eLearning chapters - 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 in the video:

- 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?

08:45 – 09:00**Accessing Zoom Online Meeting Room****09:00 – 09:15****Event opening and introduction to the webinar****09:15 – 10:15****Introduction to Finances in Horizon Europe**

- Key principles of EU funding for R&I projects
- Overview of the Annotated Model Grant Agreement
- Grant types and funding rules
- Importance of budgeting
- Eligibility rules
- Direct and Indirect cost
- Introduction to the major cost categories in an R&I project budget

10:15 - 10:30

Coffee break

10:30 – 11:15**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

11:15 – 11:30

Coffee break

11:30 – 12:30**Introduction to Financial Reporting**

- Fundamentals of financial management in R&I projects
- Calculation of actual costs
- Grey zone rules

12:30-13:30

Lunch break

13:30 – 15:30**Workshop: Budgeting and Reporting in HE**

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, etc. Then they get the documentation for the real occurred costs, and they will have to fill in the financial statement for the European Commission.