European Funding Academy
Online

Horizon Europe

Proposal Writing

Project Management

Financial Rules

Novelties: Innovation; Open Science; Data Management; PEDR

Fully online:

live webinars complemented with eLearning
and live Q&A sessions

Horizon Europe Proposal Writing

12-13 October 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 **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 – 09:45	**Networking session**
09:45 – 10:30	**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

10.30 – 10:45	Coffee Break
10:45 – 12:00	**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
- 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 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

14-15 October 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 – 09:45	**Networking session**
09:45 – 10:45	**Grant Agreement and the Consortium Agreement**

A 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?

10:45 – 11:00	Coffee Break
11:00 – 11:45	**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.

11:45– 12:00	Break for a coffee, late breakfast or other
12:00 – 12:45	**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.

Horizon Europe Financial Rules (vs. H2020)

19-20 October 2021

Mandatory module before the webinar

Are you new to the 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

09:00 – 09:15   Event opening and introduction to the webinar

09:15 – 09:45   Networking session

09:45 – 10:30   Hitchhiker's Guide to the Financial Rules of H2020 and HE Personnel Costs – Part I

- 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

10:45 – 11:30   Hitchhiker's Guide to the Financial Rules of H2020 and HE Personnel Costs - Part II:

- 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

11:45 – 12:30   Hitchhiker's Guide to the Financial Rules of H2020 and HE Subcontracting/Third parties/Other costs

- Subcontracting and other third parties
- Travel costs, Consumables vs Overheads
- Equipment and assets
- Internally invoiced items in H2020 and in HE
- Indirect costs calculation

12:45 – 13:30   **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

13:30 - 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

08:30 – 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 a 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 novelties

21 October 2021

Mandatory module before the webinar – concept of Innovation in HE

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

08:45 – 09:00	**Accessing the webinar room**
09:00 – 09:15	Event opening and introduction to the webinar
09:15 – 09:45	**Networking session**
09:45 – 10:45	**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 in sections 1.1, 1.2, 2.1, 2.2, 3.1 and 3.2 (Examples)
- Innovation management integration – how?
- Budgetary aspects
- Exploitation routes, capturing results
- Commercialisation (Licencing, joint ventures, spin-offs, etc.)
- Non-commercial exploitation routes
- What will the evaluators look for?

10:45 – 11:00	Technical break
11:00 – 11:45	**Open science and data management**

- How to handle open access in your EU project?
- How to take into consideration institutional policies, how to ensure the FAIR principles and what data management plan should be developed by whom for a social science project or a security project?
- What is the European Open Science Cloud, what is OpenAire, Zenodo, etc?
- What does the European Commission favour?

11:45 – 12:00	Technical break
12:00 – 12:30	**Exploitation, dissemination and communication: Things you wish you had known before the first periodic report.**

How can we set up a good 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 on how to collect their numbers across the project and avoid last-minute confusion. Let's look at how to fill out the reporting tables on the EU portal. Be ready for tweaks and changes in the strategy and learn to anticipate reviewers' suggestions.

Afternoon

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

14:00 - 15:00   **Live Q&A session with the experts**

During this session the **best practices, examples** from 4 different organisations will be discussed.