



## PROPOSAL WRITING FOR RESEARCH & INNOVATION PROJECTS

*From the Fundamentals to Developing  
Winning Proposals for  
Research and Innovation Projects*

LEAD EXPERT

### **Chrisa Petritsi**

INTERNATIONAL DEVELOPMENT EXPERT

Chrisa is currently serving as Team Leader at European Investment Bank (EIB) having worked for years in Developing and Planning Funding Programmes and evaluating Proposals. Chrisa has been involved in more than 30 programme evaluations and more than 100 project evaluations, as well as in socio-economic impact assessments. Over the past 35 years she has been focused on the development planning at local, national and international level providing management advisory services and operational/project support focusing on resource management and efficiency; in designing and evaluating regional and socio-economic development policy, on drafting technical reports, on working with businesses and other beneficiaries. Chrisa has work experience with a wide range of programme beneficiaries such as Managing Authorities/Intermediaries, Local/Regional Development Agencies, the IFS, Research Centres, the industry etc.; leading Financial and technical feasibility studies, Preparation of business-plans, Preparation and management of business clusters, Applications for EU-funding and TA during project/grant implementation.

### TRAINING AGENDA

#### Day 1 - ESSENTIAL ELEMENTS OF A SUCCESSFUL PROJECT PROPOSAL

**Session 1** An overview of the Programming Period 2021-2027 opportunities for project funding **09:00 – 9:30**

- The main elements and targets of EU Cohesion Policy 2021-2027
- What do we know so far from the programming documents?

**Session 2** Innovation Policy for 2021-2027, types of funding streams and the small details that matter **9:30 – 10:30**

- The most important currently available funding streams for R&I projects at EU level and member state level
- Differences and similarities of Horizon Europe from H2020
- How to focus on the elements that matter

**Coffee Break 10:30 – 11:00**

**Session 3** Exploring the different notions of innovation **11:30 – 12:00**

- Distinguishing between R&D and innovation
- Product & service innovation
- Technological innovation
- Process innovation
- Exploring some other types of innovation: social innovation, innovation in creative industries, environmental innovation
- Differences and similarities between R&D and innovation project proposals

**Session 4** How to ensure the best fit between your project and an available funding stream/Call. Eligibility of costs **12:00 – 12:30**

- Finding the correct Call
- The criteria list: eligibility, thresholds, evaluation
- “Deconstructing” the Call: a class exercise

**Lunch Break 13:00 – 14:00**

**Session 5** An overview of winning proposal essential features (precision & clarity, planning & research, realism, grasping text, documentation & data) **13:00 – 13:30**

- Brief overview: what is a project proposal, basic skills required (problem-solving, planning, presentation), types of proposals (solicited/unsolicited), questions a proposal needs to answer, essential features of a good proposal (precision & clarity, planning & research, realism, documentation & data), the “concept/intervention logic” of a “project (what, why, who, how), the process of developing a project and a proposal, step-by-step, the components of a project proposal (examples of proposal structures: ROP, H2020), recap of main points
- Short class exercises:
  - Let's work on a project idea
  - Let's work on a project “concept/intervention logic”

**Session 5a** Tips and exercises on the proposal development process: developing the best project justification (vision, need, opportunity, goals & objectives, outcomes) **13:30 – 15:30**

- What is “justification”?
- Do I need a “vision”? How to develop the best “vision” statement
- How to use data to back-up your claims (it is not what you know to be true; it is what you can prove that matters)
- Presentation matters: writing techniques
- Short class exercises

**Coffee break 15:30 – 16:00**

**Session 5b** Tips and exercises on the proposal development process: demonstrating impact **16:00 – 16:30**

## OTHER COURSES

MANAGEMENT AND COORDINATION OF  
E.C. FUNDED PROJECTS;  
THE PM<sup>2</sup> METHODOLOGY

PM<sup>2</sup> PROJECT MANAGEMENT  
METHODOLOGY FOR EUROPEAN FUNDED  
PROJECTS

RISK MANAGEMENT FOR EC FUNDED  
PROJECTS

PROPOSAL WRITING FOR RESEARCH &  
INNOVATION PROJECTS

IMPACT OF E.C. FUNDED RESEARCH

FINANCIAL ADMINISTRATION & AUDITING  
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Building services for European  
Agencies and Organisations



### CONSULTATION

Tailored solutions for innovators  
and project stakeholders in their  
journey from Inception to  
Implementation

- What is impact and how is it measured?
- How is it linked to Key Impact Pathways and quantifiable indicators?
- Do I need documentation? What type? How much?
- Short class exercises

**Session 5c** Tips and exercises on the proposal development process: pulling together the right assets (partners, experience, intellectual property, tangible & intangible resources) **16:30 – 17:00**

- Right partners: who are they and why are they needed? How to find them
- Capitalising on expertise and experience: what evaluators are looking for and how to exploit it
- Suitable assets: do they matter?

**Session 6** Putting yourself in the role of the “evaluator” **17:00 – 17:30**

- How to “switch hats”
- Testing for: readability and clarity, terminology & language, intervention logic, monitoring of outcomes, dissemination
- Scoring a project proposal: a class exercise
- Improving your proposal: what to do with your “low score” areas

**End of Day 1 17:30**

## DAY 2 – DEMONSTRATING GOOD PLANNING AND CONTROL OF THE IMPLEMENTATION PROCESS

**Session 1** Working-out the implementation plan: tips and exercises for a well thought-out “work plan” (activities, time-planning, resources, cost, flexibility) **09:00 – 10:00**

- The “work plan”: focusing on the main elements (tips and exercises)
- How to explore alternatives
- Sensitivity analysis
- Identifying critical paths and avoiding bottlenecks (tips and exercises): “crashing” activities
- A tool for continuous improvement

**Coffee Break 10:00 – 10:30**

**Session 1 continuation 10:30 – 11:00**

**Session 2** Dealing with risk: tips and exercises for a good risk management plan **11:00 – 12:00**

- What is risk and how to identify it
- Do we need to plan for all types of risk?
- Various responses to risk. Why we need risk mitigation
- How much “mitigation” do I need to show in my proposal?
- Short class exercises

**Session 3** Developing a sound dissemination and exploitation plan: demonstrating viability/sustainability of your project (the “business plan” element) **12:00 – 13:00**

- What is dissemination? What is exploitation?
- Horizon Europe requirements for dissemination and exploitation
- What is a “business plan”? Do I need one?
- The concept and process of “commercialisation”
- Can I demonstrate “profit” or “rate of return” on my investment?
- Have I taken into account of the “competition”? How?
- Short class exercises

**Lunch Break 13:00 – 13:30**

**Session 3 - continuation 13:30 – 14:00**

**Session 4 - Workshop 14:00 – 17:30**

- Short proposals on “imaginary projects”
- Developing project proposals for “actual projects”

**End of Day 2 17:30**

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