PROPOSAL WRITING FOR RESEARCH & INNOVATION PROJECTS

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

LEAD EXPERT

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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 us 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 – MATCHING PROJECTS TO FUNDING SOURCES

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 MFF 2021-2027 and NGEU
· What do we know so far from the programming documents?
· Which programmes offer funding opportunities for Innovation?

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
· Detailed presentation of Horizon Europe funding streams (based on most recent programming documents)
· Expected Horizon Europe Calls
· How to focus on programme elements that are important for your project proposal

Coffee Break 10:30 – 11:00

Session 3 How to ensure the best fit between your project and an available funding stream/Call **11:00 – 12:00**
· Finding the correct Call
· Focus on the criteria list: eligibility, thresholds, evaluation
· "Deconstructing" the Call: a class exercise

Session 4 Exploring the different notions of innovation **12:00 – 13:00**
· 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.
· How to place your project on the R&D-Innovation continuum.

Lunch Break 13:00 – 14:00

Session 5 Questions/answers on funding streams and discussion **14:00 – 15:00**

End of Day 1 15:00

WHY THIS COURSE

This course includes everything a good project planner and manager should know in order to first design successful and meaningful projects and then present them in a way that is both understandable by evaluators and convincing. Preparation is the most important tool for a winning project proposal, so it takes more than a few tips on writing skills and proposal structure in order to produce good project proposals. It requires a clear project vision and intervention logic, a sound framework of suitable and complementary project assets, and effective project management and control structures. It also requires critical skills that will help you review, evaluate and improve your proposal before submitting it.

Participants of the 3-day training will learn:

◉ How to discover Funding streams under Innovation Policy for 2021-2027

◉ How to differentiate between R&D and Innovation projects and explore where on the R&D-Innovation continuum their project lies.

◉ How to ensure the best fit between their project and an available funding stream in order to increase their chances for funding.

◉ Which proposal features are essential for convincing project evaluators and receiving the highest scores.

◉ How to write a well-constructed proposal with a clear intervention logic and use effective writing styles.

◉ How to develop a detailed work breakdown structure (WBS) and an effective project timeplan and how to identify and deal with project critical paths.

◉ How to develop a risk management and monitoring plan.

◉ How to identify impact pathways, how to approach quantification and documentation issues and how to strengthen impact through a sound dissemination and exploitation plan.

TRAINING AGENDA

DAY 2 – ESSENTIAL ELEMENTS OF WINNING PROPOSALS

Session 1 An overview of winning proposal essential features (precision & clarity, planning & research, realism, grasping text, documentation & data) **9:00 – 9:30**
- 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 2 Developing the best project justification (vision, need, opportunity, goals & objectives, outcomes) **9:30 – 10:30**
- 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 10:30 – 11:00

Session 3 Demonstrating impact **11:00 – 11:30**
- 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 4 Pulling together the right assets (partners, experience, intellectual property, tangible & intangible resources) **11:30 – 12:00**
- Right partners: who are they and why are they needed? How to find them.
- Capitalizing on expertise and experience: what evaluators are looking for and how to exploit it.
- Suitable assets: do they matter?

Session 5 Putting yourself in the role of the "evaluator" **12:00 – 13:00**
- 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.

Lunch Break 13:00 – 14:00

Session 6 Short proposal on "imaginary agreed project": justification, impact pathways **14:00 – 15:00**

End of Day 2 15:00

OTHER COURSES

MANAGEMENT AND COORDINATION OF E.C. FUNDED PROJECTS; THE PM² METHODOLOGY

PM² 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 PREPARATION FOR E.C. FUNDED PROJECTS

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

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TRAINING AGENDA

DAY 3 – DEMONSTRATING GOOD PLANNING AND CONTROL OF THE IMPLEMENTATION PROCESS

Session 1 Working-out the implementation plan: tips and exercises for a well thought-out "workplan" (activities, time-planning, resources, cost, flexibility)
09:00 – 10:30
- 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 10:30 – 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 onto account of the "competition"? How?
- Short class exercises

Lunch Break 13:00 – 14:00

Session 4 - Workshop/exercise session **14:00 – 15:00**
- Short proposal on "imaginary agreed project": workplan, risk management, dissemination & exploitation

End of Day 3 15:00

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