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 AND MAIN ELEMENTS OF WINNING PROPOSALS

Session 1: Innovation Policy for 2021-2027, types of funding streams and the small details that matter 09:00 – 11:00
- Brief overview of EU MFF 2021-2027 and NGEU.
- The most important currently available funding streams for R&I projects at EU level and member state level.
- Detailed presentation of Horizon Europe funding streams – Differences and similarities.
- Finding the correct Call for your project.
- "Deconstructing" the Call.

Coffee Break 11:00 – 11:15

Session 2: Exploring the different notions of innovation 11:15 – 12:30
- 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.

Session 3: An overview of winning proposal essential features (precision & clarity, planning & research, realism, grasping text, documentation & data) 12:30 – 13:00
- What is a project proposal?
- Basic skills required (problem-solving, planning, presentation),
- Basic questions a proposal needs to answer,
- Essential features of a good proposal (precision & clarity, planning & research, realism, documentation & data),
- The "concept/intervention logic" (what, why, who, how),
- The process of developing a project and a proposal, step-by-step.

Lunch Break 13:00 – 14:00

Session 4: Developing the best project justification (vision, need, opportunity, goals & objectives, outcomes) 14:00 – 15:00
- 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.

Session 5: Demonstrating impact 15:00 – 15:45
- What is impact and how is it measured?
- Key Impact Pathways and quantifiable indicators
- Do I need documentation? What type? How much?

Coffee break 15:45 – 16:00

Session 6: Pulling together the right assets (partners, experience, intellectual property, tangible & intangible resources) 16:00 – 17:00
- 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 7: 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

Questions & answers 17:30 – 18:00
End of Day 1 18:00

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RISK MANAGEMENT FOR EC FUNDED PROJECTS

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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 – 10:30
- The "work plan": focusing on the main elements
- How to explore alternatives
- Sensitivity analysis
- Identifying critical paths and avoiding bottlenecks (tips and exercises): "crashing" activities

Coffee Break 10:30 – 10:45

Session 2: Dealing with risk: tips and exercises for a good risk management plan
10:45 – 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 "commercialization".
- Have I taken into account of the "competition"? How?
- Examples and short class exercises.

Lunch Break 13:00 – 14:00

Session 4: Workshop/exercise session **14:00 – 15:45**
- Short proposal on an "imaginary project": objectives, project partners, scientific method and points of excellence, deliverables and workplan, outputs-results-impacts, risk management, dissemination & exploitation, etc.

Coffee Break 15:45 – 16:00

Session 4: Workshop/exercise session (continued) **16:00 – 17:30**

Questions & answers 17:30 – 18:00
End of Day 2 18:00

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