

KARELIA

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Interim report **Ě** how to prepare, what to expect

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Interim report

- “ Description of first implementation year - both operationally and financially.
- “ Narrative report
- “ Financial report
- “ Annexes



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When to report?

- “ Schedule in payment and reporting plan
- “ Interim report within one month of the end of reporting period
- “ Payment request and expenditure verification report within three months of the end of implementation period

How to report?

- “ Clear and consistent presentation
- “ Simple enough
- “ Plain text
- “ Divide text with subheading where possible
- “ Honesty

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Example:

All the planned activities has been implemented+

Project arranged a seminar for the target group. There were 50 participants. %

Project arranged a seminar for the target group. Seminar was found useful and it helped partners to plan further actions in the project. Amount of the participants (50) was not as big as anticipated and final seminar was planned to arrange in other way based on these experiences.+



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Content of the interim report

- “ Summary
- “ Work Plan
- “ Indicators
- “ Communication and visibility

Summary . four parts

- “ Description of the implemented project activities
- “ Financial situation
- “ Challenges
- “ Cooperation between partners . Lead partner´s view

Work plan

- “ More detailed description of the progress by each Work Package
- “ Update information related to status, roles and schedule

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View interim report

Comments Print PDF Back

Basic information Summary **Work plan** Indicators Communication and visibility Annexes Signature

Describe implementation of the activities, completed outputs, if any, and the locations where activities took place

Edit the activity by clicking the name of the activity in the Work plan below.

Name	Description
WP 4 D	A B K
WP 1	A B R
WP 2 C	Activity 2.1. Establishment of Karelian art residency network, coordinative community; Activity 2.2. Holding an
WP 3 B	3.1 Art-residences as incentive instrument for territory development, holding a two-day seminar-training

Work plan

Task name	Start time	Duration	SE	Jul	Aug
Karelian /	2018-09-01	701			
WP 1.1	2018-09-01	213	X		
WP 2.1	2018-09-01	701	X		
WP 3.1	2018-09-01	213	X		
WP 4. Learning	2019-04-01	499	X		

Roles of the partners

RESPONSIBLE ACCOUNTABLE

WP 1.1	R/A
--------	-----

Add activity

Name of the activity * WP 1. Work package number one

Description
Activity 1.1. This and that has been done. It has been found good and fruitful.
Activity 1.2.xxxxxx
Activity 1.3. xxxxxxxx

Status of the activity In progress

Estimated start date * 07/10/2018

Estimated end date * 01/04/2019

Activity order * 1

Responsible partner

Accountable partner

Consulted partner Karelian

Informed partner Select

Location x Russia-Republic of Karelia

Output Output 1

Save Cancel Delete

Status of the activity To do

To do

In progress

Completed

Estimated start date * 01/04/2019

Estimated end date * 01/04/2019

Activity order * 1



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Indicators

“ Update realized cumulative values by the end of reporting period.

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Basic information Summary Work plan Indicators Communication and visibility Annexes Signature

Indicators

Provide cumulative information of realised indicators.

Thematic indicators

Indicator	Target value	Realised cumulative value
	0.00	<input type="text" value="0"/>
	0.00	<input type="text" value="0"/>

Project specific indicators

Indicator	Target value	Realised cumulative value
	3.00	<input type="text" value="0"/>
	1200.00	<input type="text" value="0"/>
	30.00	<input type="text" value="0"/>
tourism - participants of the seminars	70.00	<input type="text" value="0"/>



Communication and visibility

- “ Description of implemented communication and visibility activities
- “ Description of target groups
- “ Description of completed communication outputs and results
- “ List published material during implementation period
- “ Links to project related sources

Interim report . narrative part

” Annexes:

- . Partner´s assessments
- . Communication and visibility indicators and outputs form
- . Financial report Template
- . Lists of attendees of seminars and other events organised by the project

Templates on programme's website

HOME NEWS & EVENTS PROGRAMME APPLY IMPLEMENT PROJECTS PHOTO GALLERY CONTACTS

- > Programme Manual
- > Grant Contract
- > Reporting
- > Payments
- > Communication
- > Procurements

PAYMENTS AND EXPENDITURE VERIFICATION

- Payments
 - Financial Identification Form
 - Financial report template
- Lead Partner's checklist template
- Timesheet template

HOME NEWS & EVENTS PROGRAMME APPLY IMPLEMENT PROJECTS PHOTO GALLERY CONTACTS

- > Programme Manual
- > Grant Contract
- > Reporting
- > Payments
- > Communication
- > Procurements
- > Capacity Building material

REPORTING

- Interim and final reporting
- Partner's assessment
- Communication and visibility indicators and outputs form



Partner's assessment

Partner's assessment

An annex to the Interim and Final reports.

To be filled in by each project partner except for the lead partner.

Project ID	
Name of the project	
Name of the partner	
Reporting period	
Partner's assessment of the realization of the project	
Partner's respective role in the project	
Challenges occurred	
Other comments	
Date	
Compiled by	
Signature	



Communication and visibility indicators

Communication and visibility indicators and outputs form
 An annex to the Interim and Final reports

Project ID	
Reporting period	

1. Communication indicators
 List the communication indicators as defined in the communication and visibility plan. Add rows if necessary.

Indicator	Target value	Realised value (reporting period)	Realised value (cumulative)

2. Communication outputs
 List the communication outputs produced and the number of copies/distribution.
 For example: The project has produced 2 different brochures, 200 copies of each and organised an event for 75 participants. In this case the number of outputs for brochures would be 2 and reach 200, and the number of events 1 and reach 75.

Outputs	Number of outputs	Reach (if applicable)	Description of the activity
Press releases			
Press articles			
TV and radio broadcastings			
Newsletters			
Leaflets or brochures			
Organised events			

Billboards			
Memory plates			
Other activities, events or publications (specify and add as many as relevant)			

3. Social media accounts and websites
 List the project's social media accounts and the number of followers/likes as well as the websites published by the project (other than the one hosted by the programme), if any, and the amount of visitors on the website.

Address	Number of followers/likes (at the end of the reporting period)	Amount of visitors (during the reporting period)	Other remarks



Interim report . financial part

- “ Consists of several spreadsheets
 - . Financial reports of the lead partner and each of reporting partner
 - . Consolidated financial report filled in by the lead partner
 - . Realised finances
- “ Content may not be locked and formulas may not be removed or changed.
- “ Financial report will be attached to the interim report as a .xls file.

Financial report

Project IU:											
Current reporting period:											
Lead Partner:											
Expenditure description A good invoice/receipt description answers to the questions: What? Where? When? Who? Why? Please add also calculation basis for instance under the heading "Travel"	Expenditures incurred										Budget per heading
	Amounts according to the original invoice and/or receipt							Amounts according to the general ledger (ONLY in case the amounts in the financial report and in the general ledger are not consistent) (Euro or Rouble)	Cumulated costs per heading accepted by the Managing Authority before current report (in EUR)	Cumulated costs (from start of implementation to present report included) (in EUR)	Costs (in EUR)
	Number of the invoice/receipt	Date of the invoice/receipt in the accounting records/general ledger	Month of the cost originally incurred	Name of the currency (Euro or Rouble)	Total cost in original currency	Exchange rate	Total cost of the reporting period per heading (in EUR)				
1. Staff							0,00				
							0,00				
							0,00				
							0,00				
Total staff							0,00	0,00	0,00	0,00	
2. Travel							0,00				
							0,00				
Total Travel							0,00	0,00	0,00	0,00	
3. Equipment and supplies							0,00				
							0,00				
Total Equipment and supplies							0,00	0,00	0,00	0,00	
4. Small scale investments							0,00				
							0,00				
							0,00				
							0,00				



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Financial report

Project ID:				
Current reporting period:				
Lead Partner				
Consolidated financial report (financial interim and final financial reports of the Lead Partner and each partner):	Budget according to the grant contract, including amendments	Expenditure incurred		
	Budgeted costs, including amendments (in EUR)	Cumulated costs accepted by the Managing Authority before current report (in EUR)	Total costs of the reporting period (in EUR)	Cumulated costs (from start of implementation to present report included) (in EUR)
Expenditure		(a)	(b)	(a)+(b)
1. Staff				
1.1. Lead Partner				0.00
1.2. Partner 1: <i>enter the name of the partner</i>				0.00
1.3. Partner 2: <i>enter the name of the partner</i>				0.00
1.4. Partner 3: <i>enter the name of the partner</i>				0.00
1.5. Partner 4: <i>enter the name of the partner</i>				0.00
1.6. Partner 5: <i>enter the name of the partner</i>				0.00
1.7. Partner 6: <i>enter the name of the partner</i>				0.00
1.8. Partner 7: <i>enter the name of the partner</i>				0.00
1.9. Partner 8: <i>enter the name of the partner</i>				0.00
1.10. Partner 9: <i>enter the name of the partner</i>				0.00
Total Staff	0,00	0,00	0,00	0,00
2. Travel				
2.1. Lead Partner				0.00
2.2. Partner 1: <i>enter the name of the partner</i>				0.00
2.3. Partner 2: <i>enter the name of the partner</i>				0.00
2.4. Partner 3: <i>enter the name of the partner</i>				0.00



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Submission of the interim report

- “ Electronically in PROMAS
- “ Remember the annexes



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Processing of reports

- “ Contact person in operational unit checks
 - . Narrative report
 - . Financial report

- “ Financial unit checks
 - . Financial report and expenditure verification report

Operational unit checks:

- “ The costs are mentioned in the project budget.
- “ The costs are related to project plan.
- “ Staff members in the budget are mentioned also project summary in PROMAS.
- “ Only travels of staff members are included in travel costs.
- “ Possible changes made to the budget are acceptable.

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Accounting records / general ledger				
Project cost centre 12366				
Project partner C code / Account 12698				
Account 3000, purchases				
Date	Verificate No	Subject	Amount	Heading
18.11.2016	00900	Partner C, salary and travel	180,422.68	1 (112,264.9 roubles) 2 (68,157.78 roubles)




Project cost under receipt number 00900 reported in the financial report under Heading 1. Staff (320,493.83 roubles) and 2. Travel costs (80,123.46 roubles)

1.Staff	Number of invoice/ receipt	Date of the invoice in the accounting records	Month of the cost originally incurred	Name of the currency (euro/rouble)	Total costs in currency (euro/rouble)	Exchange rate	Total costs in currency (euro/rouble)
Partner C: Igor Smirnov, part-time worker, Salary cost January 2016	00900	18.11.2016	1/2016	roubles	46 128,68	79.754	578,39
Partner C: Igor Smirnov, part-time worker, Salary costs February 2016	00900	18.11.2016	2/2016	roubles	66 136,22	83.5018	792,03



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Information in personnel list

Igor Smirnov	Project manager			
Name	Igor Smirnov			
Organization	Partner organisation			
Position	Project manager			
Tasks in the project	Overall administration and coordination of the project, reporting to the Managing Authority, interaction with the partners and stakeholders.			
Start date in the project	01/01/2019			
End date in the project	31/01/2020			
	<input type="radio"/> Full-time	<input checked="" type="radio"/> Part-time		
	<input type="button" value="Close"/>			



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2. Travel costs	Number of invoice/receipt	Date of the invoice in the accounting records	Month of the cost originally incurred	Name of the currency	Total costs in currency (euro/rouble)	Exchange rate	Total costs in currency (euro/rouble)
Partner C: Igor Smirnov, project meeting with the lead partner in Joensuu, 1.-5.2.2016 (bus ticket, accommodation, daily allowances)	00900	18.11.2016	2/2016	roubles	68 157,78	83.5018	816,24



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Information in the project budget

Partner 1: Project meetings in Joensuu				
Accommodation	Per night	24	90	2160,00
Transport	Per trip	12	80	960,00
Daily allowances	Per day	30	10	300,00
Partner 1: Seminar 2 in Petrozavodsk				
Accommodation	Per night	24	90	2160,00
Transport	Per trip	8	80	640,00
Daily allowances	Per day	28	10	280,00

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Purchases

4. Small-scale investments				
Harvester for pilot area	per item	1	30000	30000,00
Tractor	per item	1	22300	22300,00
Excavator	per item	1	50000	50000,00
Caterpillar	per item	1	35000	35000,00



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Purchases in PROMAS

Manage project summary

Project information | Managing authority | Partners | Personnel list | **Purchases**

[+ Add new purchase](#)

Item	Value in original currency	Date	View	Edit	Delete
Harvester	2000000	18/03/2019			

Page size: 20 | Records 1 to 1 of (1) | **1**

Purchases

Item	Harvester
Purchaser	Partner 1
Supplier	LogTrader ltd.
Value in original currency	2000000
Date	18/03/2019
Method of tender	Tender in writing from three tenderers: LogTrader ltd., HarWest Oy and ForestTech Company. Lowest price was offered by LogTrader.



Approval of the interim report

- “ Prerequisite for the interim payment
- “ After OU approval financial unit start their checking process

-> Payment order

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Partner change in PROMAS

- ” Needed when adding or removing partner
- ” To be done before contract addendum
- ” Coming soon!



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The screenshot displays the KARELIA web application interface. At the top, there is a navigation bar with tabs for Home, Support, User rights, Project management, and Documents. The 'Project management' tab is selected. Below the navigation bar, the main content area is titled 'Request for partner change'. On the left side of this area, there are two buttons: '+ Add new' (with the description 'To add a new partner,') and '- Remove' (with the description 'To remove an existing'). Below these buttons is a table with a header row containing 'Partner', 'Region', 'Type', 'Active', 'Add/Edit information', and 'View'. A dropdown menu is open from the 'Request for partner change' title, listing several options: 'Payments', 'Requests for change', 'Request for partner change' (which is circled in green), 'Addendum', 'Recoveries', 'Memorandum', 'Project summary', and 'Project reports'.



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Home Support User rights Project management Documents

Request for partner change - add new partner [Back](#)

Identity

Type

Full legal name

Name of the organisation in original language

Country

Region

Department/ unit in charge of the activities

Business ID

Legal status

Type of organisation

Description of the organisation

Official address

Postal address

Telephone number

Email of the organisation

Website of the organisation

Contact person

Name



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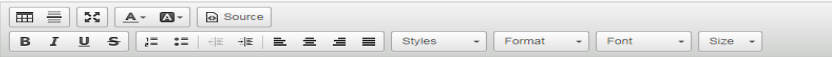
Request for partner change - remove an existing partner. Back

Date *

Change *

Partner *

Proposed change



Grounds for the change

Budget impacts

Requested by

Organization

Name

Position



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Quiz

” www.menti.com

” Code 19 03 38



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Kiitos huomiostanne



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