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## Project reporting

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- ” Reporting is being seen as an external part
- ” Reporting is only for Managing Authority
- ” Report is being made day before dead line by +Report responsible+ only.



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## Why to report?

- “ To inform MA about the progress of the project
  - “ Provides up to date information for all the partners
  - “ Updating the project plan
  - “ Financial check-up
- > grounds for further payments, contractual obligation

## How to prepare for reporting?

- “ Division of tasks of each partner and employee
- “ Schedules for submitting material to the lead partner
- “ Preparing during reporting period instead of starting work at the end of reporting period
  - . Midterm check-ups

## How to report?

- “ Clear and consistent presentation
- “ Simple enough
- “ Honesty

## What MA wants to know about your project?

- “ What has been done during reporting period
- “ What challenges have been faced
- “ Cooperation between partners during the reporting period.

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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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# Reporting in practice





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# Reporting in practice

The screenshot shows the PROMAS web application interface. At the top, there is a dark blue header with the text 'PROMAS' and the KARELIA logo (CBC // Cross-border cooperation). Below the header is a navigation menu with the following items: Home, Support, User rights, Project management, and a partially visible 'Form'. The 'Project management' menu is expanded, showing a list of options: Payments, Requests for change, Contract addendum, Recoveries, Memorandum, Project summary, and Project reports. A 'View concept note' button is visible in the main content area.



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# Report types

- ” Project update
- ” Interim report
- ” Final report



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## Payment and reporting plan



Report	Reporting period	Submitted to Managing Authority by	Partners submitting expenditure verification report
First Advance Payment Request	-	After the Grant Contract has been signed	
Project Update	1.10.2018 – 31.3.2019	15.4.2019	
Interim Report (Narrative and Financial Report)	1.10.2018 – 30.9.2019	31.10.2019	
Interim Payment Request and Expenditure Verification Report	1.10.2018 – 30.9.2019	31.12.2019	Only Lead Partner
Project Update	1.10.2019 – 31.3.2020	15.4.2020	
2 <sup>nd</sup> Interim Report (Narrative and Financial Report)	1.10.2019 – 30.9.2020	31.10.2020	
2 <sup>nd</sup> Interim Payment Request and Expenditure Verification Report	1.10.2019 – 30.9.2020	31.12.2020	All four partners
Project Update	1.10.2020 – 31.3.2021	15.4.2021	
Final report (Narrative report)	1.10.2018 – 30.9.2021	31.1.2022	
Final Financial report; Final Payment request with expenditure verification report	1.10.2020 – 30.9.2021	31.1.2022	All four partners



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**PROMAS**  Welcome, Kari 








Home Support User rights Project management


### Manage project reports

Project update  Final report  Interim report

**+ Add new**

**Delete selected**

<input type="checkbox"/>	Report type	Start date of the reporting period ▲	End date of the reporting period	Status	Submitted date	View	Edit	Delete
	Interim report			Reopened	11/06/2018			
<input type="checkbox"/>	Interim report			Pending				
	Project update			Reopened	11/06/2018			

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## Project update

- “ Brief progress report
- “ Reporting period 6 months
  - . from the start of the project
  - . from the end of the previous interim report
- “ Submitted within 15 days of the end of reporting period
- “ Submitted electronically in PROMAS only
- “ Partnership agreements attached to first update



## Interim report

- “ Narrative and financial part (+ annexes)
- “ Reporting period one year
- “ Submitted within one month of the end of reporting period
- “ Submitted electronically in PROMAS only

## Interim report . narrative part

- “ Assessment of measures implemented
- “ Results attained during the reporting period
- “ Challenges met during implementation
- “ Achievements
- “ Cooperation between the partners



## Interim report . narrative part

- ” Workplan is updated
- ” Indicator values are provided
- ” Communication and visibility activities are described
  - . reached target groups and completed outputs and results, if any
  - . list published material and links to project related sources.

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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... ...established in cooperation with...
WP 1	A... B... R... ...and establish the network... details...
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	SB	Jul	Aug
Karelian /	2019-09-01	701	+		
WP 1.1	2019-09-01	213	X		
WP 2.1	2019-09-01	701	X		
WP 3.1	2019-09-01	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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## Interim report . narrative part

” Annexes:

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

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# Partner's assessment

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	
Problems occurred	
Other comments	
Date	
Compiled by	
Signature	



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## Interim report . financial part

- “ Excel-based spreadsheet . template in programme website
- “ Realised expenses are reported by cost type
- “ Informative description of receipts is provided

## Interim report . financial part

- “ Consists of several spreadsheets
  - . Financial reports of the lead partner and each of reporting partner
  - . Consolidated financial report filled by the lead partner
  - . Realised finances
- ” Content may not be locked and formulas may not be removed or changed

## 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				
<b>Total staff</b>							<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	
2. Travel							0,00				
							0,00				
<b>Total Travel</b>							<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	
3. Equipment and supplies							0,00				
							0,00				
<b>Total Equipment and supplies</b>							<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	
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)
<b>1. Staff</b>				
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
<b>Total Staff</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>
<b>2. Travel</b>				
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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## Final report

- “ Narrative and financial part (+ annexes)
- “ Reporting period for the narrative part is the total duration of the project
- “ Reporting period for the financial part is last unreported months
- “ Submitted within four months of the end of the project
- “ Submitted electronically in PROMAS.
- “ Narrative part also hard copy signed by the project manager

## Processing of reports

- “ Contact person in operational unit checks
  - . Narrative report
  - . Financial report
- “ Financial unit checks
  - . Financial report and expenditure verification report
- “ Operational units target schedule for approving reports is 45 days. After that the financial unit has 45 days for the financial checks.
- “ Additional information may be requested

T3  
T4 T5

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# What the MA pays attention to

- ” Relevance
- ” Efficiency 

T1
T2
- ” Effectiveness
- ” Sustainability
- ” Communication and visibility



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## Dia 27

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- T1** Cost efficiency, planned schedule, Roles of the partners, Efficiency of management.  
Tekijä; 16.8.2018
- T2** How the needs of the target groups has been fulfilled
- Involvement of the stakeholders
- Measurement of indicators  
Tekijä; 16.8.2018
- T3** Effectiveness  
Tekijä; 16.8.2018
- T4** Production of qualified outputs, will the outputs help to achieve the specific objective  
Tekijä; 16.8.2018
- T5** Sustainability, communication and visibility. Capacity to maintain the results  
Tekijä; 16.8.2018

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# Feedback

” Comments provided in PROMAS



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# Modifying the project



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## What can be changed

- “ Work plan
- “ Partners
- “ Budget
- “ Implementation period ( at latest: 2 months before end date)



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## What cannot be changed

- ” Specific objective
- ” Increase total costs of the budget



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## Changes that need to be applied in advance and require an appendix to the Grant Contract:

- “ Changes between cost headings exceeding 15%;
- “ Changes in the implementation period;
- “ Changes in the work plan;
- “ Partner additions or dismissals.

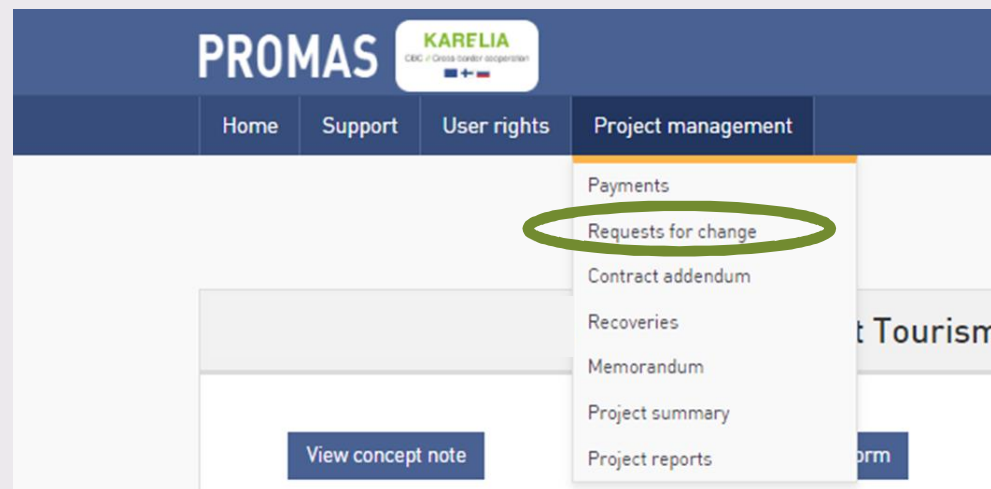


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## Request for change in PROMAS



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**Request for change details**

Date \* 31/08/2018

Change \* Select

Proposed change

Grid, List, Refresh, Font size (A- A+), Source

**B I U S**, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink

Select

- Select
- Activities
- Budget
- Implementation Period
- Other
- Partners

Grounds for the change

Budget impacts



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