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Project reporting

Jarkko Kärkimaa
Niko Auer



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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



Reporting in practice



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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 nd Interim Report (Narrative and Financial Report)	1.10.2019 – 30.9.2020	31.10.2020	
2 nd 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, KA

- 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
<input type="checkbox"/>	Interim report			Reopened	11/06/2018			
<input checked="" type="checkbox"/>	Interim report			Pending				
<input type="checkbox"/>	Project update			Reopened	11/06/2018			

Page size : 20 ▾ Records 1 to 3 of (3) 1



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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



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Project update Print PDF Back

Basic information **Project progress** Annexes

Project progress

2.1 Progress of the implemented activities in relation to all project activities (%):

2.2 Level of incurred expenditure in relation to the total budget (%):

2.3 Has the project been able to follow the indicative work plan? If no, why?

2.4 Is there need to change the work plan? If yes, describe the needed changes.

2.5 Description of the progress of the project:

Source

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< Previous Save & Next >



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Interim report

- Annual extended progress 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...
WP 1. ...	A... B... R...
WP 2. C...	Activity 2.1. Establishment of Karelian art residency network coordinative roundtable; Activity 2.2. Holding an online youth Art Residency network conference
WP 3. ...	3.1 Art-residencies as innovative instrument for territory development, holding a two-day seminar-training for artists and culture workers

Work plan

Task name	Start time	Duration	18	19	20
Karelian/	2018-09-01	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. Useary	2019-04-01	489	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. xxxxxxx
Activity 1.3. xxxxxxx

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

Informed partner

Location * 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

Final report

- Conclusive report
- Narrative and financial part (+ annexes like in Interim report)
- 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

Processing of reports

Operational unit:

- Indicated in the project budget
- Necessary for project implementation

Financial unit:

- Incurred during implementation period
- Identifiable and verifiable
- Comply with requirements of applicable tax and social legislation
- Reasonable, justified and comply with requirements of sound financial management
- Supported by invoices or documents

Processing of reports

- Operational unit's 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 26

- 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.

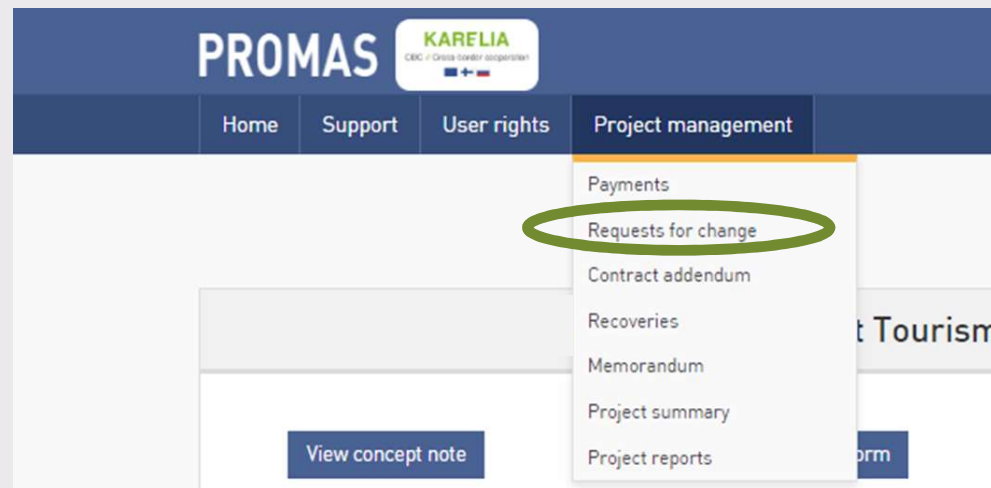


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Change request in PROMAS



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Request for change details

Date * 31/08/2018

Change * Select

Proposed change

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Select

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

Grounds for the change

Budget impacts



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Спасибо за внимание
Kiitos huomiostanne



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