



TAKING  
**COOPERATION**  
FORWARD



Project Implementation Training  
Vienna 19 June 2019



**Activity reporting**



Interreg CENTRAL EUROPE | Joint Secretariat

# AGENDA

Basics:  
Reporting  
process  
Types of reports

PR Section A :  
Summary,  
Indicators &  
Annexes

PR Section B:  
Reporting per  
work package

Modifications



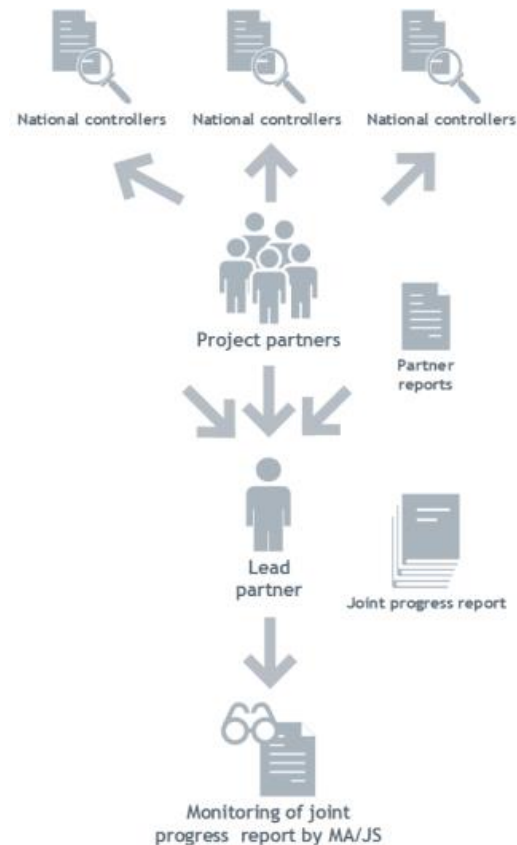
# REPORTING PROCESS

## CONTENT PART

- LP collects information from all partners via partner reports
- LP consolidates partner reports into a progress report describing project progress and achievements (outputs and deliverables)
- Progress report (PR) to be submitted by LP to JS every 6 months

## FINANCIAL PART

- Will be further addressed in the Financial Part of the Project Implementation Training



# REPORTING

## Progress report



Provides programme bodies with an overview on project progress and is the basis for the reimbursement of funds



Submission through eMS - offline template available on programme website



To be submitted through eMS by lead partner at the latest 2 months after end of reporting period



# TYPES OF REPORTS - OVERVIEW

## Progress report

Full PR (period 1, 3, 5)

- full level of information
- full set of supporting documents to be attached

Light PR (period 2, 4)

- Only main achievements and progress summary on WP level
- no content-related attachments to be delivered

Last PR (last period)

- same as full PR
- in addition communication result indicators, achievement of communication objectives and target groups reached

## Final report

Final Report (together with last PR)



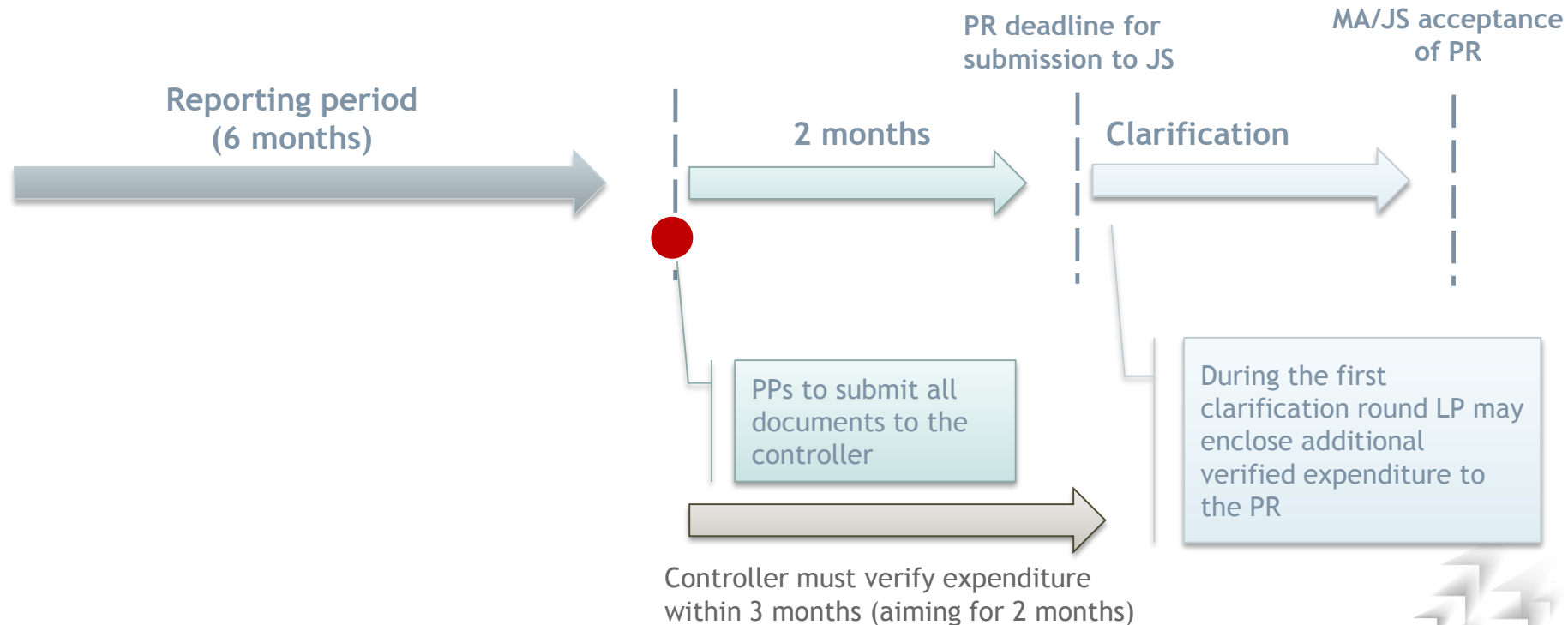
# 3 TYPES OF PROGRESS REPORTS

		Full PR	Light PR	Last PR
Section A	Highlights of main achievements (summary)	✓	✓	✓
	Project specific objectives achievement	✓	✓	✓
	Project outputs achievement ( <i>pre-filled</i> )	✓	✓	✓
	Thematic result indicators	✓	✓	✓
	Communication result indicators			✓
	Target groups reached			✓
	Financial explanations	✓	✓	✓
Section B Work packages	Progress in the current reporting period (summary)	✓	✓	✓
	Problems and deviations, if applicable	✓	✓	✓
	Activities, deliverables and outputs	✓		✓
	Documentation of outputs and deliverables achieved in the reporting period	✓		✓
	WP C: Achievement of communication objectives			✓



# REPORTING TIMELINE

Partners are to submit their partner report to their national controllers immediately after the end of the reporting period



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# HOW TO DRAFT A SUMMARY OF MAIN ACHIEVEMENTS?

## DO`s and DON`Ts



- Style of a **news release**, easy to understand for non specialist
- Prepare it in cooperation **with COM manager**
- **Cumulative** info on key achievements since the beginning of the project
- Focus only on **content related achievements** (project specific objectives, outputs)
- Describe the added value of cooperation



- Do not focus on management issues
- Do not use project internal abbreviations

A - Joint progress report > B - Reporting per work package > C - Certificates of expenditure > D - Joint progress report

**Joint progress report**

**Period 1 - 01.04.2019 - 30.09.2019**

Start date: 01.04.2019 End date: 30.09.2019

Highlights of main achievements (summary)

Please describe the project progress which was achieved up to the current period. In particular, please highlight if specific objectives and/or outputs were reached and explain the added value. The summary should highlight main achievements, and be understandable for non-specialists. Please write in a style of press release. (Required for all reports including "light" reports)

# HOW TO REPORT ON PROJECT SPECIFIC OBJECTIVES ?

## DO`s and DON`Ts

Project specific objectives

Project specific objectives	Level of achievement	Explanations
1 - Objective one	<div><div>-</div><div>Fully achieved to a large degree to a minor degree not achieved</div></div>	
2 - Objective two		
3 - Objective 3	<div><div>-</div></div>	



- Refer to the project specific objectives (as in the AF)
- Use drop down menu for selecting **level of achievement**
- Indicate the **cumulative progress** achieved so far
- Give a **concise and clear and realistic explanation**
- Be **consistent** with the work progress described in other parts of the PR



- Information and level of achievement should not contradict with previous PRs

# HOW TO MEASURE PROGRESS AND RESULTS?

- Through indicators at three levels:
  - Output indicators (*in each PR*)
  - Result indicators (*thematic ones in each PR*)
  - Target group indicators (*only in last PR*)



# WHERE TO REPORT OUTPUT INDICATORS?

- Output indicators are reported in the thematic work packages  
**BUT** section A of PR provides an **automatically generated overview table** showing **cumulative information on project outputs**

Project outputs achievement (cumulative)

Programme output indicator	Output indicator target	Output indicator values reported so far	Output number	Output title	Output quantification (target)	Planned delivery month	Achieved so far (cumulative for the entire project including current period)	Level of achievement (cumulative for the entire project including current period)
S.O.2.1 - Number of strategies and action plans developed and/or implemented for improved energy efficiency and renewable energy use in public infrastructures	10.0	1,00	T1.1.1	Strategy öasdskföasldkf	9,00	Mai.2017	1,00	not started
			T2.3.1	Output transnational strategy	1,00	Jan.2019	0,00	not started
S.O.2.1 - Number of tools and/or services developed and /or implemented for improved energy efficiency and renewable energy use in public infrastructures	4.0	0,00	T1.2.1	Action Plan adsfköaslkdföaslkf	1,00	Mrz.2017	0,00	not started
			T2.1.1	Output Tool	3,00	Jul.2018	0,00	not started
S.O.2.1 - Number of pilot actions implemented for improved energy efficiency and renewable energy use in public infrastructures	8.0	0,00	T2.2.1	Output Pilot actions	8,00	Jan.2019	0,00	not started
S.O.2.1 - Investment	2.0	0,00	I1.1.1	Investment ITALY	1,00	Jan.2018	0,00	not started
			I2.1.1	Investment SLOV	1,00	Jan.2018	0,00	not started

# WHAT ARE THE DIFFERENT RESULT INDICATOR TYPES?

- 2 types of result indicators:
  - **Thematic result** indicators (*to be reported in every PR*)
  - **Communication result** indicators (*only in last PR*)

## Hints



- Result **indicators** and **targets** are transferred from the AF
- Provide a **quantification** of thematic indicators reached in the period
- Give a concise and **clear explanation** on the reported number (include reference to activity or deliverable number) consistent with WP progress
- **Check the indicator definitions** in the implementation manual chapter B.2

# RESULT INDICATORS

## DO`s and DON`Ts



- Realistic and transparent **quantification**
- Based on **accomplished outputs and deliverables** - explicit reference to be included in the related textbox
- Ensure compliance with **indicator definitions**
- **Aggregate figures** provided by partners after a **thorough quality check**
- Keep in mind the set targets and **monitor the progress**



- Ensure that **no multiple counting** occurs, e.g. between periods and partners



# TARGET GROUPS

- Target groups reached are to be reported in the last PR only

## Hints



- **Quantify** each target group reached throughout the project
- Give a brief **explanation** on the reported number
- **Describe** how each target group was involved (e.g. reference to deliverable or activity number, if applicable)

# TARGET GROUPS

## DO`s and DON`Ts



- Reported figures should reflect **only active involvement** of target groups but not general dissemination activities
- **LP should continuously monitor and aggregate figures** as provided by partners after a thorough **quality check**
- Consider **only entities** and not persons
- Keep in mind the set targets and ensure a **transparent quantification**
- Ensure **consistency** with project activities



- **No multiple counting** of the same entity in the same or different periods or addressed by different partners





# AGENDA

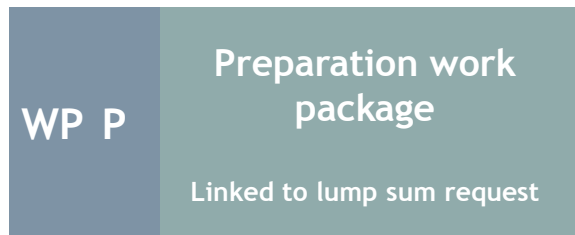
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# REPORTING PER WORK PACKAGE



No reporting of activities needed



# REPORTING PER WORK PACKAGE - SUMMARY OF PROGRESS ACHIEVED

A - Project report   **B - Reporting per work package**   C - Certificates of expenditure   D - Project report financial tables   E - Annexes

### Management work package

Nr.	Title	Start date	End date	Status	Expenditure - current report
M	Management	Jul.2016	Jun.2019	<div>not started not started completed proceeding according to work plan behind schedule ahead of schedule</div>	€ 0,00

**Involved partners**

Abbreviation	Name
ABC	Ministerio ABC(lead Partner)
DFG	Miasto DFG
HJH	Reg HJH
KLM	Grad KLM

Please describe the progress in the current reporting period and explain how partners were involved in the activities (who did what).  
For thematic and communication work packages, please explain how target groups (and other stakeholders) were involved in the activities and development of the project outputs.

If applicable, please describe and justify any problems and deviations including delays from the work plan as presented in the application form and the solutions found.

Please describe the progress of activities and deliverables achieved in the current reporting period.

#### A.M.1

Activity Title	Start month	End month	Status
Start-up activities	07.2016	09.2016	

#### D.M.1.1

Deliverable title	Deliverable description	Planned delivery month	Status
Subsidy Contract signed	Subsidy contract signed between MA and LP	07.2016	

Upload deliverable document

Del Description

## Hints



- Clear **summary** of WP progress (include additional information to the deliverable description)
- Describe **involvement** of each partner
- Explain how **target groups including associated partners** were involved and how they will further use the outputs
- Describe **problems and deviations** (including delays) transparently and respective **solutions**, if applicable

# REPORTING PER WORK PACKAGE - OUTPUTS LEVEL OF ACHIEVEMENT

## Hints



- Indicate for each output its current **level of achievement** (drop down menu)
- Quantify** the outputs finalised in the current period
- Upload **output documentation (output fact sheets)** - only for finalised outputs and applicable only for full PRs

Project output	Output description	Programme output indicator	Planned delivery month	Output quantification (target)	Achieved so far (this reporting period not included)	Achieved in the current period	Level of achievement (cumulative for the entire project including current period)	Upload output documentation (output fact sheet or investment report)
T1.1 Strategy 0asdKf0asdkf	Sed vitae bibendum purus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Integer luctus, lectus at ullamcorper molestie, orci risus convallis nunc, eget porta felis lectus nec tortor. Etiam tellus sem, iaculis eu blandit vel, vestibulum ac urna. Nunc sapien ante, vehicula id tortor ut, placerat congue velit. Praesent ut feugiat felis, a vehicula lectus. Etiam posuere sed purus et mollis. Aenean sagittis sollicitudin odio vitae fermentum. Vivamus pha	S.O.2.1 - Number of strategies and action plans developed and/or implemented for improved energy efficiency and renewable energy use in public infrastructures	Mai.2017	9,00	1,00		not started not started completed proceeding according to work plan behind schedule ahead of schedule	Upload
T1.2 Action Plan adsfK0asdkf0asdkf	Sed vitae bibendum purus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Integer luctus, lectus at ullamcorper molestie, orci risus convallis nunc, eget porta felis lectus nec tortor. Etiam tellus sem, iaculis eu blandit vel, vestibulum ac urna. Nunc sapien ante, vehicula id tortor ut, placerat congue velit. Praesent ut feugiat felis, a vehicula lectus. Etiam posuere sed purus et mollis. Aenean sagittis sollicitudin odio vitae fermentum. Vivamus pha	S.O.2.1 - Number of tools and/or services developed and /or implemented for improved energy efficiency and renewable energy use in public infrastructures	Mrz.2017	1,00	0,00			load

*Reporting of outputs only applicable for thematic work packages and investment specifications*

# WHAT IS AN OUTPUT FACT SHEET?

## Hints



- Finalised outputs have to be documented within an “**output factsheet**” (templates tailored to each output type)
- Presents complementary (summary information) to the deliverable reflecting the final stage of the output
- Use a style that is **easy to understand for non-specialists**
- One output factsheet per output - presenting the achievements
- Factsheets will be published on the CE Programme website (output library)

## Example:

Outputs: 4 action plans developed for 4 central European cities



to be documented within 4 output fact sheets

# OUTPUT FACT SHEETS

## OUTPUT FACT SHEET

Strategies and action plans

Version 1

Project index number and acronym	
Lead partner	
Output number and title	
Responsible partner (PP name and number)	
Project website	
Delivery date	
Summary description of the strategy/action plan (developed and/or implemented)	
<div></div> <div>Max. 2,000 characters</div>	

## Structure

- Summary description
- NUTS region(s) concerned
- Expected impact and benefits for the territories and target groups
- Sustainability and transferability
- Lessons learned and added value of transnational cooperation
- References to relevant deliverables and web-links that are available on the project website

# REPORTING PER WORK PACKAGE - PROGRESS OF DELIVERABLES

To be reported in full PRs only

Please describe the progress of activities and deliverables achieved in the current reporting period.

A.M.1			
Activity Title Start-up activities	Start month 07.2016	End month 09.2016	Status <input type="text"/>
D.M.1.1			
Deliverable title Subsidy Contract signed	Deliverable description Subsidy contract signed between MA and LP	Planned delivery month 07.2016	Status <input type="text"/> Upload deliverable documentation <input type="button" value="Upload"/>
Deliverable description			
D.M.1.2			
Deliverable title Partnership Agreement signed	Deliverable description PA signed by all partners	Planned delivery month 08.2016	Status <input type="text"/> Upload deliverable documentation <input type="button" value="Upload"/>
Deliverable description			
D.M.1.3			



*Ensure consistency regarding the level of achievement/  
status for the different levels (specific objectives,  
outputs and deliverables)*

## Hints



- Indicate for each deliverable its **current status** (drop down menu)
- Include a **concise explanation on the progress**
- Upload **only finalised deliverables**

# WHAT MAKES A GOOD QUALITY DELIVERABLE?

## Hints



- Building on **existing knowledge, practices** and lessons learnt
- Clear **contribution to achievement of an output**
- Comprehensive **documentation** of performed activities and their outcomes
- Include at least an **executive summary in English** (in case national language(s) are used)
- WP leader and the LP should perform a thorough **quality check**
- Ensure a proper layout and compliance with **publicity obligations**, consistency of number, title (with AF) and file name
- Ensure the **value for money**





# OUTPUTS AND DELIVERABLES

## How to name your files?



Deliverables:

CExx acronym Dxxxxx short title\_date



Output fact sheets:

CExx acronym Oxxxxx short title\_date

Investment fact sheet:

CExx acronym Ixxxxx short title\_date



# HOW TO DOCUMENT MEETINGS?

## Management meetings

(e.g. steering committee, coordination)



### Minutes of meeting:

- Date and place
- Represented partners and participants
- Main points of discussions
- Conclusions/decisions
- Relevant annexes, if applicable

## Stakeholder meetings/events



### Summary:

- Date and place
- Number and types of participants/target groups
- Topics tackled and links to deliverables, outputs
- Expected effects and follow up
- If relevant, annexes: e.g. pictures, media coverage web-links etc.

# HOW TO REPORT ON INVESTMENTS? SUMMARY OF PROGRESS

## Hints



- Only if investment specification has been foreseen in the AF
- **Similar reporting structure** as other WPs (but no deliverables)

A - Project report   B - Reporting per work package   C - Certificates of expenditure   D - Project report financial tables   E - Annexes

### Investment specification

Nr.	Title	Start date	End date	Status	Expenditure - current report	% of expenditure reported so far
I1	Investment óalsdkfóla	Feb.2017	Jan.2018	not started	€ 0,00	0,00 %

Involved partners

Abbreviation	Name
ABC	Ministerio ABC(lead Partner)

Please describe the progress in the current reporting period and explain how partners were involved in the activities (who did what).  
For thematic and communication work packages, please explain how target groups (and other stakeholders) were involved in the activities and development of the project outputs.

2000 Characters Remaining

If applicable, please describe and justify any problems and deviations including delays from the work plan as presented in the application form and the solutions found.

1000 Characters Remaining

Project output	Output description	Programme output indicator	Planned delivery month	Output quantification (target)	Achieved so far (this reporting period not included)	Achieved in the current period	Level of achievement (cumulative for the entire project including current period)	Upload output documentation (output fact sheet or investment report)
I1.1 Investment ITALY	Sed vitae bibendum purus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Integer luctus, lectus at ullamcorper molestie, orci risus convallis nunc, eget porta felis lectus nec tortor. Etiam tellus sem, iaculis eu blandit vel, vestibulum ac urna. Nunc sapien ante, vehicula id tortor ut, placerat congue velit. Praesent ut feugiat felis, a vehicula lectus. Etiam posuere sed purus et mollis. Aenean sagittis sollicitudin odio vitae fermentum. Vivamus pha	S.O.2.1 - Investment	Jan.2018	1,00	0,00		not started	Upload

Please describe the progress of activities and deliverables achieved in the current reporting period.

A.I1.1

Activity Title	Start month	End month	Status
Investment implementation	02.2017	01.2018	

# HOW TO REPORT ON INVESTMENTS?

## Hints



Clearly describe the **current progress of implementation**

Highlight **delays and potential risks** for successful realisation

Investment to be considered as output

Report accompanying activities under the **linked thematic work package** (pilot action)

Upload **investment fact sheet** for finalised investment(s) (using the programme template)

# INVESTMENT FACT SHEET

## INVESTMENT FACT SHEET

Investment number and title

Version 2

Project index number and acronym	
Responsible partner (PP name and number)	
Linked to pilot action (number and title)	
Project website	
Delivery date	

Description and technical characteristics of the investment
ca. 2.000-6.000 characters (depending on the investment size and related costs)

Investment costs (EUR) including a break-down of main cost items

Investment location		
NUTS 3	Address (Street, house number, postal code, city, country)	GPS coordinates

## Structure

- Description and technical characteristics of the investment
- Investment costs
- Investment location
- Duration and process of investment implementation
- Ownership and durability
- References to related pilot action, relevant deliverables and web-links

# WP COMMUNICATION

A - Project report > B - Reporting per work package > C - Certificates of expenditure > D - Project report financial tables > E - Annexes

**Communication work package**

Nr.	Title	Start date	End date	Status	Expenditure - current report	% of expenditure reported so far
C	Communication	Jul.2016	Jun.2019	<input type="text" value="not started"/>	€ 0,00	0,00 %

**Involved partners**

Abbreviation	Name
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DFG	Miasto DFG
HJ	Reg HJ
KLM	Grad KLM

Please describe the progress in the current reporting period and explain how partners were involved in the activities (who did what).  
For thematic and communication work packages, please explain how target groups (and other stakeholders) were involved in the activities and development of the project outputs.

2000 Characters Remaining

If applicable, please describe and justify any problems and deviations including delays from the work plan as presented in the application form and the solutions found.

1000 Characters Remaining

Communication objectives: What is the progress toward the communication objectives as defined in the application form? The level of achievement should be cumulative. However, the explanation should describe achievements in this reporting period.

**Influence attitude and behaviour**

Description	Level of achievement
Sed vitae bibendum purus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Integer luctus, lectus at ultricies molestie, orci nunc convallis nunc, eget porta felis lectus nec, tortor. Etiam hilus sem, lacinia eu blandit vel, vestibulum ac urna. Nunc sapien ante, vehicula id tortor ut, placerat congue velit. Praesent ut feugiat felis, a vehicula lectus. Etiam posuere sed curus et	<input type="text" value="Fully achieved"/>
Explanations	<input type="text" value="to a large degree"/>

**Raise awareness and increase knowledge**

Level of achievement

## Hints



- Indicate how far **communication objectives** have been reached (applicable only for the last PR)
- Clear summary of WP C progress
- Indicate for each deliverable its **current status** (drop down menu) and include a concise explanation on the **progress of deliverables**
- **Upload** only finalised deliverables, applicable only for full PRs

# REPORTING ANNEXES

## Key annexes to the joint progress report



- Communication strategy with first PR - template is published on the programme website
- Documentation of outputs and deliverables achieved within the reporting period (not applicable for light reports)
- Control documents for each PP: certificate of expenditure, control report, control checklist
- Lead partner verifications checklist
- LP payment request



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Modifications



# PROJECT MODIFICATIONS

No major modifications (except partnership) are allowed before the mid-term review

## Major modifications



Partnership



Activities/ deliverables/outputs



Budget



Extension of project duration

- ⇒ To be based on a formal modification request procedure (see Implementation Manual D.3) requiring a sound justification
- ⇒ Update of AF in eMS required
- ⇒ To be approved by the relevant programme bodies

# PROJECT MODIFICATIONS

## Minor modifications



Adjustments of the  
work plan

⇒ To report as  
deviation in the  
progress report



Update of administrative  
elements

⇒ To update the  
supplementary  
information in eMS,  
if applicable



Budget flexibility  
(below flexibility thresholds)

⇒ To report as  
deviation in the  
progress report

In case of doubt, please [consult the JS](#) to verify if the planned modification is minor or major.

# SUPPORT

Implementation documents and  
toolbox available on the website  
[www.interreg-central.eu](http://www.interreg-central.eu)

Joint secretariat

National contact points



# CONTACTS

TAKING  
COOPERATION  
FORWARD



Joint Secretariat  
Interreg CENTRAL EUROPE Programme



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[Instagram.com/interregce](https://Instagram.com/interregce)