

TAKING
COOPERATION
FORWARD



Project Implementation Training
Vienna | 21-22 September 2016



Workshop: Activity reporting



Interreg CENTRAL EUROPE | Joint Secretariat

AGENDA

How to report

A closer look at
the activity
report

Reporting per
work package



HOW TO REPORT



- LP collects information from all partners via partner reports
- Progress report to be submitted by LP to JS every 6 months
- Reporting of project progress and achievements (outputs and deliverables)
- Reporting of expenditure (include certificates of expenditure) and payment claim





Organise the work among partners, make use of WP leaders



Set specific internal deadlines



Collect information via partner reports in eMS



Ensure time for quality check (partner and project report)



Think ahead (don't wait for the last minute)



A REPORT SHOULD BE...



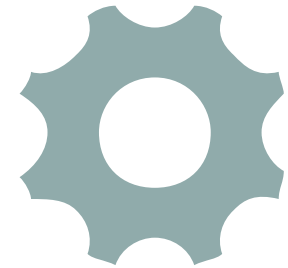
Consistent

Terminology should be aligned with the one used by the programme and in the application form



Transparent

It should provide clear information and detail on the progress and achievements



Concrete

It should explain who did what and how and give evidence



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TAKING COOPERATION FORWARD

HIGHLIGHTS OF MAIN ACHIEVEMENTS

- SUMMARY

A - Project report

B - Reporting per work package

C - Certificates of expenditure

D - Proj

Project Progress Report

Period 1 - 01.07.2016 - 31.12.2016

Start Date

01.07.16

End Date

31.12.16

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. The summary should highlight main achievements, and be understandable for non-specialists. Please write in a style of press release.



Hints

- Style of a **news release**
- Prepare it in cooperation **with COM manager**
- **Cumulative** info on key achievements
- **Focus only on content**, not on management issues



PROJECT SPECIFIC OBJECTIVES ACHIEVEMENTS

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>	

Hints

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



PROJECT OUTPUTS ACHIEVEMENT

Hints

- Automatically generated **overview table**
- Shows **cumulative information on outputs** as reported in the work plan
- Helps LP to monitor project progress

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 öasdikfoasidkf	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 adsfkfoasikdföasikf	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
			I1.1.1	Investment ITALY	1,00	Jan.2018	0,00	not started
S.O.2.1 - Investment	2.0	0,00	I2.1.1	Investment SLOV	1,00	Jan.2018	0,00	not started



ADDITIONAL RESULT INDICATORS

Hints

- Result indicators and targets (as in the AF) are listed
- Provide a **quantification** of indicators reached in the **current period**
- Give a concise and clear **explanation** on the reported number (include reference to activity or deliverable number)

Project Result Indicators

Thematic result indicator	Measurement unit	Target	Reached current report	Previously reached	Explanations
Number of institutions adopting new and/or improved strategies and action plans	Institutions	60,00	0,00	6,00	
Number of institutions applying new and/or improved tools and services	Institutions	40,00	0,00	2,00	
Amount of funds leveraged based on project achievements	EUR	100.000,00	0,00	3,00	
Number of jobs created (FTE) based on project achievements	FTE	10,00	0,00	4,00	
Number of trained persons	Persons	350,00	0,00	5,00	
Communication result indicator	Measurement unit	Target	Reached current report	Previously reached	Explanations
Unique visits to the project website (digital reach)	Number of stakeholders reached	20.000,00	0,00	1,00	
Participants at project Events (physical reach)	Number of stakeholders reached	5.000,00	0,00	2,00	
Event participants satisfied with information provided (satisfaction with information)	Percentage of stakeholders satisfied	100,00	0,00	3,00	
Joint communication activities implemented with external stakeholders (external cooperation)	Number of communication activities	10,00	0,00	4,00	



Thematic result indicators

- Institutions adopting new and/or improved strategies and action plans
- Institutions applying new and/or improved tools and services
- Funds leveraged based on project achievements
- Jobs created (FTE) based on project achievements
- Trained persons



See definitions as included in the implementation manual chapter B.3

Communication result indicators

- Unique visits to the project website (*digital reach*)
- Participants at project events planned in WP C (*physical reach*)
- WP C event participants satisfied with information provided (*satisfaction with information*)
- Joint communication activities implemented with external stakeholders (*external cooperation*)



DO`s and DON`Ts



Realistic and transparent **quantification**

Based on **accomplished outputs, deliverables and activities** - 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



RESULT INDICATOR QUIZ



TARGET GROUPS REACHED

Target groups reached

Target groups	Target value	Target group values reached in previous reporting periods	Quantification of target groups reached in the current period	Explanation of provided quantification	Description of the target group involvement	Progress of target groups reached so far (% of target)
Local public authority	100,00	4,00	<input type="text" value="0,00"/>	500 Characters Remaining	255 Characters Remaining	4,00 %
Regional public authority	30,00	2,00	<input type="text" value="0,00"/>	500 Characters Remaining	255 Characters Remaining	6,67 %
Sectoral agency	30,00	3,00	<input type="text" value="0,00"/>	500 Characters Remaining	255 Characters Remaining	10,00 %
Education/training centre and school	100,00	4,00	<input type="text" value="0,00"/>	500 Characters Remaining	255 Characters Remaining	4,00 %
other	1.000,00	5,00	<input type="text" value="0,00"/>	500 Characters Remaining	255 Characters Remaining	0,50 %
Higher education and research	50,00	6,00	<input type="text" value="0,00"/>	500 Characters Remaining	255 Characters Remaining	12,00 %
General public	1.000.000,00	7,00	<input type="text" value="0,00"/>	500 Characters Remaining	255 Characters Remaining	0,00 %

Hints

- Categories of target groups and target values (as in the AF) are listed
- Quantify** each target group reached in the current period
- Give a brief **explanation** on the reported number
- Describe** how each target group was involved



DO`s and DON`Ts



Reported figures should reflect **only active involvement** of target groups (e.g. trainings, interviews, pilot actions etc.) but not general dissemination activities

Aggregate figures as provided by partners after a thorough quality check

Consider **only entities** and not persons

Ensure a **transparent quantification**

Ensure **consistency** with project activities

Keep in mind the set targets



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



AGENDA

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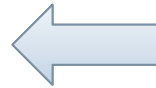


REPORTING PER WORK PACKAGE

WP P

Preparation
work package

Linked to lump sum
request



No reporting of activities needed

WP M

Management
work package

Management activities

WP T

Thematic work
packages

Content activities

WP C

Communication
work package

Activities related to
transfer of outputs

I

Investment
specification

Investments above
15.000 €



REPORTING PER WORK PACKAGE - SUMMARY

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><div>not started</div><div>completed</div><div>proceeding according to work plan</div><div>behind schedule</div><div>ahead of schedule</div></div>	€ 0,00

Involved partners

Abbreviation	Name
ABC	Ministerio ABC(lead Partner)
DFG	Miasto DFG
HJJ	Reg HJJ
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
 Upload

Del Description

Hints

- Clear **summary** of WP progress and status
- 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) and respective **solutions**, if applicable



REPORTING PER WORK PACKAGE - OUTPUTS

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 oasdkfoasdkf	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, laculis 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	Upload
T1.2 Action Plan adsfkoasdkfoasdkf	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, laculis 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	Mai.2017	1,00	0,00		not started completed proceeding according to work plan behind schedule ahead of schedule	Upload

Hints

- Planned **outputs** (as in the AF) are listed
- Indicate for each output its current **level of achievement** (drop down menu)
- Quantify** the outputs finalised in the current period
- For finalised outputs upload **output documentation** (output fact sheets)

Reporting of outputs only for thematic work packages and investment specifications



Types of outputs



Strategies and
action plans



Tools



Pilot actions



Trainings



Innovation
networks (only
SO1.1)

*See definitions as included in the implementation
manual chapter B.3*



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

One output factsheet per output - presenting the achievements

Example:

Outputs: 4 action plans developed for 4 central European cities

→ to be documented within 4 output fact sheets



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 TN cooperation
- References to relevant deliverables and web-links



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>Max. 2,000 characters</div>	





REPORTING PER WORK PACKAGE - ACTIVITIES AND DELIVERABLES

Hints

- Planned activities and deliverables (as in the AF) are listed
- Indicate for each activity and deliverable its **current status** (drop down menu)
- For deliverables include a **concise explanation on the progress**
- Upload finalised deliverables

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	<input type="text"/>
D.M.1.1			
Deliverable title	Deliverable description	Planned delivery month	Status
Subsidy Contract signed	Subsidy contract signed between MA and LP	07.2016	<input type="text"/>
Deliverable description		Upload deliverable documentation  Upload	
D.M.1.2			
Deliverable title	Deliverable description	Planned delivery month	Status
Partnership Agreement signed	PA signed by all partners	08.2016	<input type="text"/>
Deliverable description		Upload deliverable documentation  Upload	
D.M.1.3			



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

At least **executive summary in English** (in case of use of national language(s))

Thorough **quality check** by the WP leader and the LP

Proper layout and compliance with **publicity obligations**, consistency of number, title (with AF) and file name

Presenting **value for money**



Recommended file name indexing

Deliverables:

CExx acronym Dxxxxx short title_date

Output fact sheets:

CExx acronym Oxxxxx short title_date

Investment report:

CExx acronym Ixxxxx short title_date



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.*



INVESTMENT SPECIFICATION

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. I1	Title Investment óalsdkfóla	Start date Feb.2017	End date Jan.2018	Status not started	Expenditure - current report € 0,00	% of expenditure reported so far 0,00 %
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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, laculis 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 Investment implementation	Start month 02.2017	End month 01.2018	Status not started
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Hints



Clearly describe the **current status 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 report** for finalised investment(s)
(programme template)



Structure

- Investment description and technical characteristics
- Investment location
- Investment costs
- Ownership and durability
- TN effect and added value
- Expected impact and benefits for the territory and target groups, leverage of funds
- Compliance with regulatory requirements
- Contribution to sustainable development and horizontal principles
- References to relevant deliverables and web-links



INVESTMENT REPORT

Investment number and title

Version 1

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

Description of the investment (including technical characteristics) explaining its embedding into the linked pilot action

ca. 2.000-8.000 characters (depending on the investment size and related costs)



Hints

- Indicate how far **communication objectives** have been reached (level of achievement and give a short explanation)
- Indicate for each activity and deliverable its **current status** (drop down menu)
- Include a concise explanation on the **progress of deliverables**
- **Upload** finalised deliverables

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	not started	€ 0,00	0,00 %

Involved partners

Abbreviation	Name
ABC	Ministerio ABC(lead Partner)
DFG	Miasto DFG
HUJ	Rag HUJ
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 ultramcorper 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 feusiat felis. a vehicula lectus. Etiam posuere sed purus et	<div> - </div> <div> Fully achieved to a large degree to a minor degree not achieved </div>

Explanations

Raise awareness and increase knowledge



IN CASE OF QUESTIONS PLEASE ADDRESS THE JS!

WE WILL BE HAPPY TO SUPPORT YOU DURING

PROJECT IMPLEMENTATION

