

Harmonised implementation tools

Monitoring checklist for

progress report

(Final version 1.1 - November 2021)

This is a monitoring checklist template for project progress reports for standard projects being implemented in any Interreg strand.

The main objectives of this document are:

* for the programme to evaluate the progression of the project based on the submitted progress report,
* to check if the project is on track (outcomes, work plan, budget, communication),
* preferably to check the quality of project results/outputs and to check promised intensity of cooperation (involvement of partners),
* to check stakeholders' and target groups' engagement,
* to provide information for communication and publicity on programme level (also reporting to COM).

At the start of some sections in the monitoring checklist you will find an explanation of the purpose and the logic of the section (in blue) that will help you understand better how the section should be used.

To reach a high level of harmonisation, the HIT tools should be used as much as possible as they are. The tools have been designed based on an agreed structure that avoids asking for similar information in different contexts. This template is harmonised with HIT application form and HIT project progress report. Please note that if one or the other changes, the other needs to be changed as well.

If needed, the following flexibility principles can be applied:

* It is possible to change the order of main parts or questions within each part.
* Changes that don't disrupt the main logic of sections/questions are possible. The logic can be disrupted when one change influences some other part(s) of the tool.
* Optional questions (in yellow) can be left out partially or in full.
* All overview tables can be customised. These are tables that take data from different fields to present this data in different combinations.
* Multiple languages are possible by adding fields to enter the text in other languages.
* Maximum length of text for answers will be decided by programmes because this depends on technical options in their online monitoring system.

###### PART A – Activity report

##### A.1 Project progress report identification

Purpose and logic:

* This section includes elements needed to identify the project and the report.
* Other information provided in the application form or at the contracting stage that might be needed when checking the report can be found in other sections of the monitoring system.
* This section should ideally be fully automated in online systems.

-----------------------------------------------------------------------------

|  |  |  |
| --- | --- | --- |
| Project ID number |  | *Pre-filled from AF* |
|  |  |  |
| Project acronym |  | *Pre-filled from AF* |
|  |  |  |
| Name of the lead partner organisation (original language or English language) |  | *Pre-filled from AF* |
|  |  |  |
|  |  |  |
| Project report number |  | *pre-filled from project progress report* |
|  |  |  |
| Reporting period start date |  | *pre-filled from project progress report* |
|  |  |  |
| Reporting period end date |  | *pre-filled from project progress report* |
|  |  |  |
| Officer responsible for this checklist |  | *Drop-down menu from contact database (if applicable)* |

##### A.2 Highlights of main achievements

|  |
| --- |
| A.2.1. Has the project included a summary highlighting the added-value of cooperation, as well as its main achievements, written in an easily-understandable and engaging way? A: Yes / No  |
| Desk officer comments, if any  |

A.3 Overview of the outputs and results achievement

This question refers to section A.3 in the project progress report and should address the progress made by the project in reaching their outputs, as well as their contribution to programme outputs and results.

A.3.1. How is the project progressing with regards to outputs, programme output indicators and programme result indicators?

A: (drop down menu? On track, delayed, delivered?)

|  |
| --- |
| *Desk officer comments, if any*  |

A.3.2. Is there any cause for concern (deviations, delays, low achievement levels, etc.) which has not been addressed in section A.4 of the project progress report?

A: Yes/ No

|  |
| --- |
| *Desk officer comments, if any*  |

A.4 Project problems and deviations

|  |
| --- |
| A.4.1. Has the project indicated experiencing problems, issues, delays or deviations in the project progress report? A: Yes/ NoIf yes, are solutions being adopted to remedy the issues identified?  |
| *Desk officer comments, if any*  |

 A.5 Target groups

In the project progress report, the project has explained for each target group in what way and to what extent they were involved in the project in this reporting period.

A.5.1. Is the project involving the target groups as indicated in the approved application form?

A: Yes/ No

A.5.2. Are there any communication activities linked to this worth noting?

A: Yes/ No

|  |
| --- |
| *Desk officer comments, if any*  |

A.5.3. How well is the project progressing in involving or reaching out to their chosen target groups?

A: (drop down menu? On track, delayed, delivered?)

|  |
| --- |
| *Desk officer comments, if any*  |

A.6 Work plan progress

Please note that information on problems and delays is asked for already in A.4. The section on investments is only relevant if the programme allows for investments. For the purposes of this checklist, the investments section is marked as optional

A.6.1. How well is the project progressing in relation to the approved work plan, including communication activities?

A: (drop down menu? On track, delayed, delivered?)

|  |
| --- |
| *Desk officer comments, if any*  |

A.6.2. How well is the project progressing in relation to the objectives described in the application form?

A: (drop down menu? On track, delayed, delivered?)

|  |
| --- |
| *Desk officer comments, if any*  |

|  |
| --- |
| A.6.3. How has the project involved the partners in the delivery of its planned activities?  |
| *Enter text here* |
|  |
|  |

A.6.4. How well is the project progressing in relation to delivery of its planned outputs?

Investment (OPTIONAL – only if the programme finances investments)

A.6.5.1. Is the project delivering the planned investments?

A: Yes/ No

A.6.5.1.1. If no, please comment

|  |
| --- |
| *Enter text*  |

A.6.5.2. Is the added-value of cooperation clear/ present?

A: Yes/ No

|  |
| --- |
| *Desk officer comments, if any*  |

A.6.5.3. Are there any deviations not indicated in section A.4 of the project progress report that impact delivery of the planned investments?

A: Yes / No

|  |
| --- |
| *Desk officer comments, if any*  |

##### A.7 Project results

A.7.1. How well is the project progressing towards their results?

A: (drop down menu? On track, delayed, delivered?)

|  |
| --- |
| *Desk officer comments, if any*  |

A.8 Horizontal principles

A.8.1. Is the project respecting the horizontal principles of the programme (sustainable development as set out in Article 11 TFEU, taking into account the UN Sustainable Development Goals, the Paris Agreement and the "Do No Significant Harm" principle; equality between men and women, gender mainstreaming and the integration of a gender perspective; non-discrimination, based on gender, racial or ethnic origin, religion or belief, disability, age or sexual orientation)?

A: Yes/ No

|  |
| --- |
| *Desk officer comments, if any*  |

Follow up actions

|  |
| --- |
| *Desk officer comments, if any*  |