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Creating a Better World
World Organization of the Scout Movement
Organisation Mondiale du Mouvement Scout
Всемирная Организация Скаутского Движения
Organización Mundial del Movimiento Scout
المنظمة العالمية للحركة الكشفية

REPORTING GUIDE

EU Funded Projects

Version November 2023

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INTRODUCTION

What Is "Reporting" & Why Is It Important?

Most of the activities run by your organization are part of a project. Projects are at the core of what we do as Scouts and managing them successfully is key to achieving your organizational objectives, as well as our vision as a Movement.

As much as planning and managing a project properly are crucial for its success, closing it correctly can have a major impact on its final outcome as well. When donors such as the European Union fund a project, high quality and timely *reporting is key* to receive funding, and hence to be able to continue our projects.

Put simply, "reporting" consists of submitting documentation and information to a donor to show that the funding allocated to a project has been spent correctly and transparently and that the overall donor requirements are met.

What This Reporting Guide Will Help You With?

When you need to report on a project activity (e.g., event, training, etc.), there are several documents and information that you need to share with the donors or the project officer who is in charge of the reporting phase. This Reporting Guide provides you with an overview of:

1. A *summary of the EU requirements* you need to be aware of to report correctly.
2. The documentation that you need to prepare & collect *before*, *during* and *after* an activity.
3. *Templates and examples* that you can download and use for your own project.

Please note that, according to the type of project activity, the below list might be subject to changes and that you might need to adjust the templates to best meet your needs.

Important Disclaimer

Remember that *different donors may have different requirements* and require specific templates (e.g., a specific agenda template, list of participants, etc.). Therefore, please use the reporting resources that you will find below critically, and make sure that you are well informed of the specific requirements of the donors funding your project.

Contact Information

If you have questions on reporting requirements and documentation, or feedback on how to further improve these guidelines, do not hesitate to contact the Project Management Officer at brussels@scout.org.

SAFETY, DIVERSITY & INCLUSION

Safe From Harm

Ensuring and maintaining a Safe From Harm approach is essential to the compliance and safety of any Scouting event.

Find here resources to create safe spaces - Final report, Glossary, and tips for practitioners - and examples of Code of Conduct from Kander100 and the WeAct project.

✓ Before: you should **ensure** every person attending the event completes a relevant Safe From Harm e-learning and that the corresponding event Code of Conduct is widely disseminated (e.g., in preparation emails, registration, etc).

✓ During: **Implement** a Listening Ear support system throughout the event, with trained staff and a visible Listening Ear point available for any personal need and to ensure reporting of any Code of Conduct violation.

✓ After: **Compile** a Safe From Harm report where necessary, to ensure continuous improvement.

Diversity & Inclusion

Understanding the diversity of your project participants and being able proactively to take steps to guarantee greater accessibility is an essential part of evaluating the impact and alignment of your project with Scouting Values. It also ensures we strive for continuous improvement, learning to understand representation to adapt and increase active inclusion in the future.

Find here a snapshot of well-being data gathering and an example of demographic reporting.

✓ Before: **Identify** the different needs of the participants well in advance, to ensure the location and services available can accommodate them well (e.g., dietary requirements, accessibility, presentation font, etc.) and consider any other factors that could limit their safe and inclusive participation (e.g., religious holidays, event location, financial requirements, etc.).

✓ During: **Collect feedback** during the day, to understand the participants´ sense of belonging and well-being. You can use a daily data-gathering exercise, peer group evaluation, or 1:1 conversations. This helps make reasonable adjustments, adapt to any triggers, or find alternative ways to ensure the safe and comfortable participation of all.

✓ After: **Evaluate and share** the D&I data and demographic information as part of your final report, to showcase best practices and highlight areas for improvement.

REPORTING RESOURCES

All the links to the reporting material listed below can be found in the folder Reporting Toolkit (EU Funded Projects). The number of the resources listed below corresponds to the number of the file in the Reporting Toolkit folder.

1. List of Participants

The list of participants is a document containing the information (e.g. full name, gender etc.) of all participants of a project activity and must be signed by all of them.

Link to the List of Participant Template.

- ✓ Before: **Fill** the template with all the available information from the participants (e.g., full name, gender, email etc.) and **print** it to have it ready for use.
- ✓ During: Make sure that **everyone signs** the list of participants as soon as possible.
- ✓ After: **Scan** the list of participants, **save** it in the relevant Google Drive/ Dropbox folder and **share** it with the responsible World Scout Bureau staff member (e.g., Project Management Officer, Project Manager etc).

2. Agenda

The agenda provides an overview of all the sessions taking place during an event. The format of the agenda can vary as needed (e.g., table, list, etc.).

Link to the Agenda Template.

- ✓ Before: **Prepare** the agenda and **share** it with relevant persons.
- ✓ During: **Update** the agenda if changes occur.
- ✓ After: **Upload** the agenda in the relevant Google Drive/ Dropbox folder and **share** it with the responsible World Scout Bureau staff member.

3. Sessions Overview

While the agenda offers a general overview of a project activity (e.g. conference, training etc.), a session overview provides an in-depth description of each session.

Link to the Session Overview Template.

- ✓ Before: **Prepare** the Session Outlines.
- ✓ During: **Update** the Session Outlines if changes occur.
- ✓ After: **Upload** the Session Outlines in the relevant Google Drive/ Dropbox folder and **share** it with the responsible World Scout Bureau staff member.

4. Participants´ Evaluation

Collecting feedback on how a scouting activity went, serves to evaluate it, understand how to improve it, and show results. Participants can evaluate different aspects of an activity, ranging from the logistics aspect to the impact on their knowledge and skills.

Find here an example of a participant evaluation focused on logistics, an impact assessment questionnaire, and an example of questions for the evaluation of training.

- ✓ Before: **Identify how** you want to collect feedback from the participants (e.g., Smartsheet form, written feedback, etc.).
- ✓ During: **Collect feedback** from all relevant persons e.g. participants, facilitators.
- ✓ After: **Upload** the participants' evaluation in the relevant Google Drive/ Dropbox folder and **share** it with the responsible World Scout Bureau staff member (ie. Project Management Officer, Project Manager etc).

5. Course Report

After project activities such as training or an event, you might need to prepare a course report. While the length and content of the report can vary according to the project activity, it is important to include all relevant information for the donors (to do so, follow the template provided below), and to write in a way that is clear and accessible to a non-scout audience.

Find here a Course Report Template and a Course Report Example.

- ✓ Before: **Identify who** will be writing the report and collecting relevant material.
- ✓ During: **Collect** relevant material that will be included in the report (list of participants, agenda, sessions overview, photos, etc.).
- ✓ After: **Share** the report with the responsible World Scout Bureau staff member and disseminate it with the project partners.

PROJECT VISIBILITY

6. Social Media & Online Visibility

When you are creating posts and sharing photos of a project activity on your social media platforms, make sure to mention that the project is "**co-funded by the European Union**" and to use the correct "Co-funded by the European Union" logo.

You can find here a vertical version and a horizontal version of the EU logo.

✓ Before: **Identify who** will be responsible for creating posts on social media platforms. It will be this person's responsibility to provide visibility to the project.

✓ During: **Collect** material for your social media posts, e.g., photos, testimonials from volunteers, etc., **share** the post online and **save the link** in a shared document.

✓ After: **Share** all the links to your online publications with the responsible World Scout Bureau staff member (e.g., Project Management Officer, Project Manager etc). The links can be shared via email, or by creating a Google doc where all partners can add the links to any publication related to the project.

7. Photos & Videos

Taking pictures and videos during an event is an easy and efficient way to show what happened during a project activity and to collect audiovisual material useful for reporting and online dissemination.

✓ Before: **Identify** the person(s) responsible for taking photos and videos and receive the **consent** of participants and team to appear in them.

✓ During: **Share** the images with your Communications responsible so that they can give visibility to the activity while it is implemented.

✓ After: **Upload** the pictures in the relevant Google Drive/ Dropbox folder and **share** it with the responsible World Scout Bureau staff member.

In order to **request consent** from participants, you must **inform** them of how the photos and videos will be used (e.g., donor reporting, social media, etc.). You must ensure that everyone who appears in your videos, photos, or shares their stories with you, is aware that the results of your work might be published on social media or other online platforms. If someone doesn't give their consent or withdraws it, you must **respect** their will and guarantee their privacy.

8. Donors Acknowledgment

In any dissemination activity and information material (e.g., social media posts, project webpage, posters, brochures, etc.) you must acknowledge EU support by using the phrase e.g., **"Co-funded by the European Union"** and/or by displaying the EU logo. The EU logo cannot be modified and, when displayed in association with other logos (e.g., of beneficiaries or sponsors), it must be displayed as prominently and visibly as the other logos.

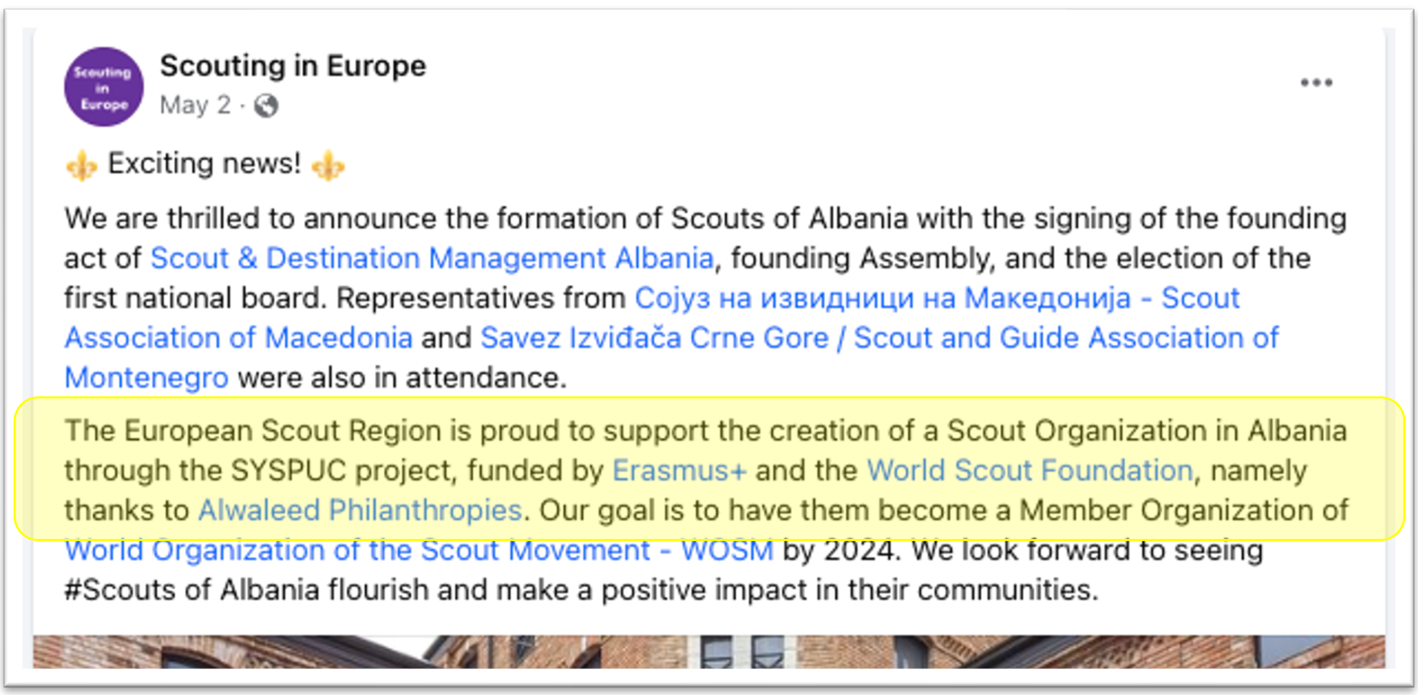
In the case of audiovisual materials, testimonials and outcomes where opinions are shown, you must use the disclaimer "*Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them*".

You can find here official translations of the disclaimer in other languages and more information on EU visibility requirements.

When you acknowledge the donor´s contribution in your social media posts, you should **tag the donors´ official Facebook/ Instagram pages**. Below are the official pages of the Erasmus+ Programme of the EU and the World Scout Foundation:

- Erasmus+ (Facebook page)
- Erasmus+ (Instagram page)
- World Scout Foundation (Instagram page)

Below is an example of a Facebook post from Scouting in Europe that shows how to acknowledge the donors' contribution (in yellow):



FINANCIAL REPORTING

9. Supporting Documents

To comply with EU requirements, is crucial to keep track of your project expenses and to correctly archive the supporting documents.

✓ Before: **Keep the original** receipts, booking confirmations, tickets, etc.

✓ During: **Archive** the original documents in a hard folder, **scan** them, and **save** a copy in the relevant folder (see chapter 11 for guidance on how to archive).

✓ After: **To request a reimbursement**, you need to share your bank details (IBAN, bank name and address, name and address of the beneficiary, currency of the bank account) with a copy of e.g., your booking confirmation and a proof of payment, with the responsible World Scout Bureau staff member (e.g., Project Management Officer, Project Manager etc).

Category	Supporting Document	Eligibility criteria
Travel	• Ticket (e.g., bus, tram, train, metro, flight, etc.)	A copy of the ticket or the receipt showing the price and the means of payment. For **plane travel** specifically, boarding passes are <u>no</u> longer requested.
	• Booking Confirmation	The booking confirmation must show the date, time, itinerary, passenger name, and ticket cost.
	• Proof of Payment	If the amount is not mentioned, you must provide an invoice or a bank statement that is clearly linked to the ticket.
Accommodation	• Booking Confirmation • Invoice/ Factura • Proof of Payment	The invoice should be as detailed as possible clearly indicating: dates of arrival and departure, the number of participants accommodated, daily rates, etc.

Visa	• Receipt issued by the Embassy • Copy of the Visa	The receipt must indicate the amount paid.
Fees (Experts, Trainers, etc.)	• A copy of the contract (dated and signed) • Invoice • Proof of Payment	In the case of payment in cash, you need to provide a statement co-signed by the expert/trainer and the person responsible in the beneficiary NGO clearly stating the amount received.
Other	• Invoice / Factura • Proof of Payment • Other	The supporting documents for other expenses such as meals, coffee breaks, room renting, etc. should at least provide a clear description of the expense, be dated, and indicate the total cost.

10. General Rules for EU-Compliance

- Only documents that are **clear, comprehensible, complete, and dated** are eligible.
- The project partners must **keep records** and other supporting documents to prove the proper implementation of the project's activities.
- The records and supporting documents must be made **available upon request** or in the context of checks, reviews, audits, or investigations conducted by the donors.
- The partners must **keep the original documents**. Digital and digitalized documents are considered originals if they are authorized by the applicable national law.
- For the financial report, only **real costs that occurred during the approved implementation period** of the project are taken into account.
- For **any invoice for € 1,000 or above**, the corresponding proof of payment (bank statement, credit card slip) must be provided.
- **In case of a cash payment**, the beneficiary NGO must provide a copy of the cash withdrawal receipt or a bank statement showing the withdrawal.
- Cheques or copies of bank transfer request forms are **not proofs of payment** and are not accepted as such. Credit card slips are accepted only if accompanied by the corresponding invoice/receipt.

- If not in English or French, documentary evidence concerning the main expenses **must be fully translated** (e.g., contracts, accommodation invoices, etc.). A summary is sufficient when it comes to smaller amounts as long as it is clear which service or goods were purchased. Official translations are not requested.
- If some expenses were **paid by a local partner on behalf of the beneficiary** NGO within the framework of an activity being held in another country, a bank statement showing the transfer of funds to this partner must be provided.

11. Archiving

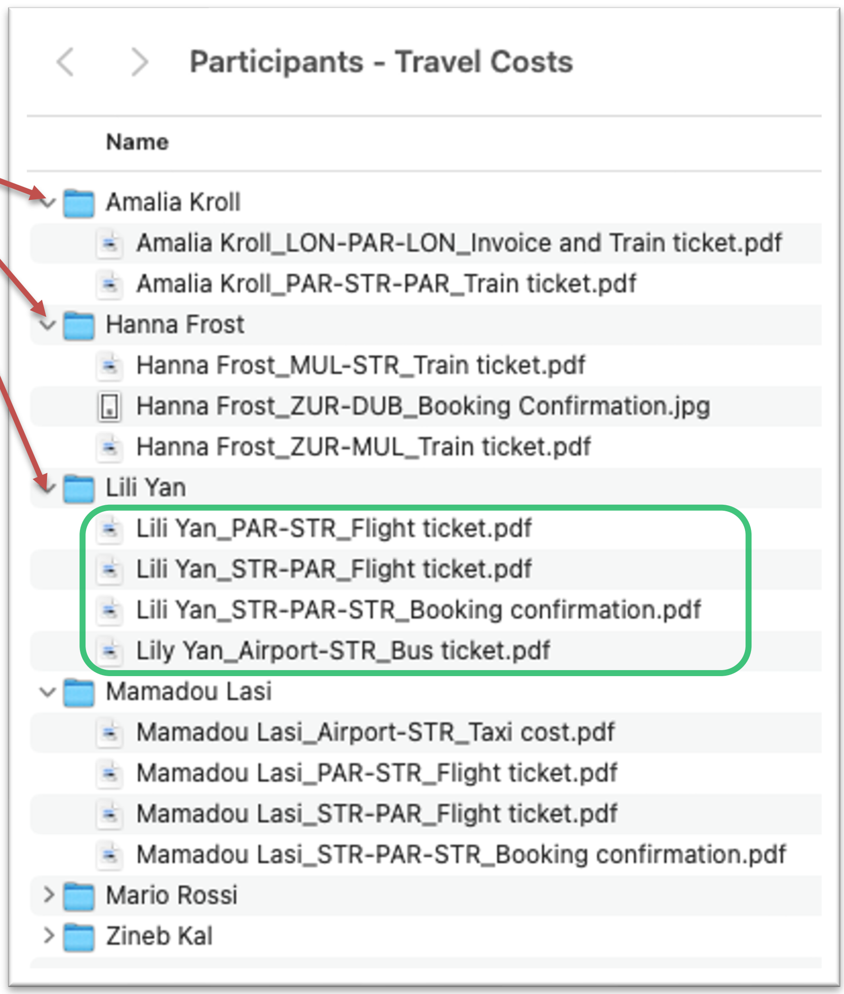
A good archiving method is important to keep track and report on your project expenses. Below is an example[1] of how to archive participants' travel documents correctly.

1. In the event folder (e.g., Academy, Training etc.) **create folders** for each project participant, e.g.
2. **Save the supporting documents** of each participant in their folders.

3. **Rename each document** as "NAME_ITINERARY_DOCUMENT TYPE".

As general rule, make sure that the document titles include a clear description of the expense, containing *participants name*, the *type of expense* (e.g., flight ticket, Visa, taxi cost, hotel etc.) and a *specific detail* about the expense (e.g., travel itinerary, dates, event name etc.).

Using a coherent archiving system will make it easier to identify each document, understand quickly if something is missing and facilitate the overall reporting process.



[1] *The names of the participants in the example are fictitious and created for the purpose of this guide.*