



EUROPEAN EDUCATION AND CULTURE  
EXECUTIVE AGENCY (EACEA)

EACEA A: Erasmus+ and EU Solidarity Corps  
A2: Skills and Innovation

**Erasmus+ Programme**  
**KA3 – Support for Policy Reform**  
**Civil Society Cooperation in the field of Education and Training**  
**(Lot 1)**

**Reporting Instructions**

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## 1. REPORT PURPOSE

Reporting on the annual work programme execution is a contractual obligation. The report allows the Agency to evaluate the actions of the beneficiary against those planned in the submitted work programme, before approving the final payment.

The preparation of the annual work programme report is also an opportunity for the grant beneficiaries to share information and contributions with all members of the beneficiary.

These reporting instructions are meant to support beneficiaries in the preparation of the report.

The report will be evaluated by the Agency, in accordance with Art.II.25.4 of the Framework Partnership Agreement, on the basis of the final report assessment grid. The grid will reflect performance quality by attributing a numerical rating for each criterion.

## 2. GENERAL RULES

1. The final report must be prepared using the **report template**, provided by the Agency for "Civil Society organisations active in the field of education and training " and published on the Agency website:  
[https://www.eacea.ec.europa.eu/grants/2014-2020/erasmus/civil-society-cooperation-field-education-and-training\\_en#ecl-inpage-975](https://www.eacea.ec.europa.eu/grants/2014-2020/erasmus/civil-society-cooperation-field-education-and-training_en#ecl-inpage-975)
2. The Final Report is divided in an operational part (public and confidential) and a financial part and includes a declaration of honour.
3. All parts of the report have to be duly filled in.
4. The same structure of the approved annual work programme must be used to report on activities.
5. No paper copies of the final report and its annexes are requested. The complete final report with all its annexes must be attached to the **eReport**.

The mandatory attachments to the eReport are:

**Final Activity Report**

**The declaration of honour** (scanned & signed)

**Operational Part Annexes**

**Financial Part Annexes**

**Please pay attention that:**

**The total size of the mandatory attachments to the eReport cannot exceed 10Mb.**

**If the attachments exceed the allowed size you can send the additional attachments by email to: [EACEA-CIVIL-EDU@ec.europa.eu](mailto:EACEA-CIVIL-EDU@ec.europa.eu)**

**You must identify your email in the subject line as follows: "Additional attachments to CSC-EDU Report n° 2021-..."):**

**Operational Part Annexes** should include all the relevant deliverables of the work programme activities, such as: publications, working papers/position papers, recommendations, meetings' minutes, leaflets etc.

**Please attach in one single Zip file all operational annexes. Zip files are allowed.**

Given the limited size allowed for the attachments it is recommended to make reference as much as possible to websites where the relevant deliverables are published.

**Financial Part Annexes** should include all the documents requested to prove the implementation of the statutory meetings (the statutory meeting's agenda and signed participants list) and the employment of the staff (staff payment supporting documents as indicated in the financial part of the final report form).

**Please attach in one single Zip file all supporting documents for personnel costs and in another single Zip file all supporting documents for statutory meetings. Zip files are allowed.**

6. The final report shall be submitted in **English, French or German** within two months following the end of the eligibility period, however for **2021 Operating Grants**<sup>1</sup> it has been agreed that reports can be submitted by **31 March 2022**.
7. The final report cannot be used for requesting any modification to the approved work programme and/or budget. This requires prior approval through the amendment procedure.

### **3. FILLING IN THE FINAL ACTIVITY REPORT**

#### **3.1. Public Part**

The **public part** encompasses the following four sections:

1. *Relevance of the activities implemented to the objectives of the action and to the strategic plan*

Under this section beneficiaries should describe how activities implemented during the reporting period have fed the general and specific call (EACEA 26/2017) objectives in addition to the objectives defined in their strategic plan.

2. *Work programme activities and outcomes*

Under this section beneficiaries should summarize the main achievements and outcomes of activities carried out during the reporting period. Both qualitative and quantitative indicators must be mentioned (e.g. size of target group reached, typology of target group etc).

3. *Dissemination and exploitation of results*

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<sup>1</sup> Because of the delays in the availability of final reports templates and instructions.

Under this section beneficiaries must describe how information needs have been designed for each stakeholder; how information has been processed and if has created a multiplier effect among a wider audience.

Quantitative indicators should be also provided (e.g. total number of participants to seminars/workshops, number of web site hits etc). Please refer to *section 5* for dissemination definition.

Regarding the exploitation of results, beneficiaries must describe to what extent these have reached policy makers at the local, regional, national and European level. In particular evidence (if applicable) should be provided if the transfer of information has lead policy makers to discuss/take action on specific issues.

#### 4. *Impact and sustainability*

Under this section beneficiaries must highlight the qualitative and quantitative indicators used to measure impact on members, stakeholders and systems, and what kind of internal monitoring strategy has been set in place to measure the impact of the action. The medium/long term sustainability of the organisation should also be addressed in this section.

### 3.2. Confidential Part

The **confidential part** encompasses the following four sections:

#### 1. *Implementation of the work programme activities*

Under this section beneficiaries must describe the implementation of the planned activities under the approved annual work programme. The activity has to be briefly described, members who took part in the activity have to be mentioned and quantified, and achieved results have to be elaborated. Any deviation from the approved annual work programme has to be notified as well. In case additional unplanned activities have been carried out, they should also be indicated.

*Please note that while the public part of the report should contain a summary of the different activities; information provided under this section should be detailed and specific to each activity.*

#### 2. *Operating management of the organisation*

Under this section detailed information should be provided on:

- **staff** - names and contacts of full time equivalent personnel (FTE) for the reporting period concerned.
- **statutory meetings** held with a brief description of meeting objectives and outcomes, dates, venue and number of participants and participating organisations.
- **internal communication** activities related to interaction, communication and networking within the beneficiary organisation. Please note that communication

activities addressed to the external environment should not be included under this heading but under heading 3 of the public part.

- **evolution of the organisation** by explaining if applicable any changes in the organisation (e.g. Statutes, new members, address, new staff and organisation chart)
- **supplementary information** that the beneficiary wants to communicate to the Agency and that is not covered in the other reporting points should be mentioned under this section.

*The list of deliverables/results must be included in the description of each activity. Each deliverable must be defined by an annex number. Annexes should be listed in an annex list in numerical order.*

### **3.3. Financial Part**

To report on the financial part, the beneficiary needs to fill in the financial statement table provided in the final report template.

The submission of the financial report will be considered complete only if the supporting documents, related to statutory meeting and staff, mentioned in the financial report template are provided.

### **3.4. Declaration of honour**

The declaration of honour must include:

- the **requested balance payment** (total grant awarded minus paid pre financing). This amount should correspond to the "balance payment requested" column of the financial statement form. Please note that the full amount of balance payment can be requested only if all planned staff and events approved in the annual work plan budget have been effectively hired/carried out.
- the date and place of the signature,
- the beneficiary organisation's name
- the name and function of the legal representative of the beneficiary organisation,
- the signature of the legal representative.

## **4. CONFIDENTIALITY**

Beneficiaries shall pay attention to the quality of the text in the **public part of the report** so that it may be published without being revised or edited. The Agency reserves the right to ask beneficiaries to fine tune the texts if needed.

**The confidential and financial parts and the declaration of honour** will be used by the Agency only for contractual purposes.

## **5. DISSEMINATION, EXPLOITATION OF RESULTS AND COPYRIGHT**

**Dissemination** is a planned process of providing information on the results of the activities to key actors. It occurs as and when the results of activities become available.

**Exploitation** is (a) a planned process of transferring the successful results of the activities to appropriate decision-makers in regulated local, regional, national or European systems, on the one hand, and (b) a planned process of convincing individual end-users to adopt and/or apply the results of the activities on the other hand.

For dissemination and exploitation of results, attention has to be paid to the respect of the contractual obligations defined in Article 7.2 of the Specific Grant Agreement and Article II.7 of the Framework Partnership Agreement.

All communication material produced must display the Erasmus + logo and the mention "Co-funded by the Erasmus+ programme of the European Union" or "With the support of the Erasmus+ Programme of the European Union". The Erasmus + logo and the specific mention can be found at: [https://www.eacea.ec.europa.eu/about-eacea/visual-identity\\_en](https://www.eacea.ec.europa.eu/about-eacea/visual-identity_en) under the section Erasmus+.

All information related to dissemination and exploitation of results should be included in section A.3 of the Public Part.

## 6. CHECKLIST

Before submitting the final report, please ensure that you have replied to all checklist questions.

Checklist questions	Yes	No
The final report template has been used		
The report is submitted within the deadline of (31/03/2022) from the end of the eligible activities.		
The report is in one of the three requested languages (English, French, German)		
The operational part is duly filled in in all requested fields		
The operational part contains the list of annexes		
The operational annexes are numbered and have a brief title		
The financial part is duly filled in in all requested fields		
The balance payment requested has been calculated taking into account the difference between the total EU grant and the pre-financing.		
The financial part contains the list of annexes		
The financial annexes are numbered and have a brief title		
The Declaration of Honour is duly filled in, with the correct indication of the balance payment, dated and signed by the legal representative.		
The complete final report, including the operational and financial parts with all the operational and financial annexes and the Declaration of Honour, has been submitted as an attachment to the eReport form.		

## 7. FINAL REPORT ASSESSMENT

The Agency will evaluate the final report on the basis of the assessment criteria (quantitative and qualitative assessment) provided in the table below.

Assessment criteria	Score	Maximum Score
<b>1. Relevance of the activities implemented to the objectives of the action and to the strategic plan</b>		<b>20</b>
<ul style="list-style-type: none"> <li>Has the implementation of the annual work programme contributed to the call general objectives?</li> </ul>	7	
<ul style="list-style-type: none"> <li>Has the implementation of the annual work programme contributed to generate concrete impacts under at least two of the call specific objectives?</li> </ul>	7	
<ul style="list-style-type: none"> <li>Has the implementation of the annual work programme contributed to the achievement of the organisation's strategic plan?</li> </ul>	6	
<b>2. Work programme activities and outcomes</b>		<b>20</b>
<ul style="list-style-type: none"> <li>Have the activities planned in the annual work programme been carried out?</li> </ul>	8	
<ul style="list-style-type: none"> <li>Are the activities well described and justified?</li> </ul>	6	
<ul style="list-style-type: none"> <li>Are the results clearly indicated and of good quality?</li> </ul>	6	
<b>3. Dissemination and exploitation of results</b>		<b>20</b>
<ul style="list-style-type: none"> <li>Does the report clearly explain how the results of the annual work programme have been disseminated to the stakeholders and among a wider audience?</li> </ul>	6	
<ul style="list-style-type: none"> <li>Have results been disseminated to the identified stakeholders?</li> </ul>	4	
<ul style="list-style-type: none"> <li>Has the implementation of the annual work programme produced any impact at policy level?</li> </ul>	6	
<ul style="list-style-type: none"> <li>Are the outputs produced and disseminated of good quality? (e.g. website/publications etc.)</li> </ul>	4	
<b>4. Impact &amp; Sustainability</b>		<b>20</b>
<ul style="list-style-type: none"> <li>Has the beneficiary clearly identified and described indicators (qualitative and quantitative) to measure impact?</li> </ul>	10	
<ul style="list-style-type: none"> <li>Was an internal monitoring strategy put in place and described?</li> </ul>	6	
<ul style="list-style-type: none"> <li>Has the beneficiary addressed the issues related to the medium/long term sustainability of the organisation?</li> </ul>	4	
<b>5. Operating management</b>		<b>20</b>
<ul style="list-style-type: none"> <li>Was all foreseen staff employed?</li> </ul>	6	



• Were all foreseen statutory meetings held?	6	
• Does the report explain how communication and networking occurred within the beneficiary organisation?	6	
• Is the final financial statement correctly presented (e.g. with correct amounts and references to staff number and statutory meetings number)?	2	
<b>TOTAL SCORE</b>		<b>100</b>

The total score (in %) will be obtained by adding up all the 5 individual scores related to the 5 assessment criteria. All the 5 assessment criteria have the same weighting.

*N.B. The reports will be scored taking into account the extent to which they thoroughly address all the aspects covered by the assessment criteria.*

## 8. ASSESSMENT RESULTS AND FINAL PAYMENTS

Beneficiaries will be informed of the assessment results. Following the assessment, the Agency shall reduce the amount of the final payment in the event of weak implementation of the work programme in accordance with Article II.25.4 of the Framework Partnership Agreement and as outlined in the table below.

Total Score	Definition	Description of the score	Reduction of the final EU contribution
100	Very Good	Addresses the criterion with all aspects of high quality	0%
90			
80	Good	Addresses the criterion with some aspects of high quality	
70			
60	Acceptable	Addresses the criterion sufficiently	
50			
40	Weak	Addresses the criterion but with some important weaknesses	25%
30			
20	Very Weak	Addresses the criterion but with significant and/or many weaknesses	35%
10			
0	No evidence	Fails to include a minimum amount of evidence to enable the criterion to be evaluated	55%
			75%

In the final assessment an overall judgement, made up of a qualitative grade and a numerical rating, will be provided as explained under heading 7. The values given will reflect the quality of the performance of the beneficiary organisation taking into consideration the objectives defined in the work plan.

The rating values which dictate the precise level of reduction of the grant, if any, run from 0 to 100, where 0 is at the bottom of the rating scale and 100 is at the top. Where the rating lies between 0 and 40, a reduction of the final EU contribution will be applied according to the scale mentioned in the table above.

## **9. CONTACT**

For any further information or clarifications, please contact the Agency via the functional mailbox for this action: [EACEA-CIVIL-EDU@ec.europa.eu](mailto:EACEA-CIVIL-EDU@ec.europa.eu)