

Fairtrade Premium plan and reporting templates

Two templates are provided below to help you prepare an annual Fairtrade Premium plan in order to comply with requirement 2.1.15 and report on activities carried out with the Fairtrade Premium to the General assembly for requirement 2.1.18.

For banana plantations using these templates also ensures you are in compliance with requirement 2.1.1. of the Fairtrade Standard for Fresh fruit for Hired Labour.

2.1.15 *The Fairtrade Premium Committee, as a result of the consultation with workers, **must prepare** a yearly Fairtrade Premium plan that **must take into account** the needs of all the various groups of workers.*

*The Fairtrade Premium plan **must contain** a reasonable budget based on expected Fairtrade Premium income, which sets priorities for Fairtrade Premium use. In the course of the year the plan **must be adjusted** if the Fairtrade Premium earnings are higher/lower than expected.*

*The description of each project **must include**:*

- *Purpose and objectives;*
- *Target group(s)/and number of beneficiaries (e.g. men, women or all workers, migrant and temporary workers, family members; community);*
- *Activities;*
- *Roles and responsibilities;*
- *Project budget (total / annual);*
- *Project start and end date;*
- *How the project will be monitored;*
- *Date of approval of project by GA.*

Guidance: *The needs of all groups (e.g. including migrant and seasonal/temporary workers, women and men etc.) should be taken into account as far as possible, and the Fairtrade Premium Committee shall determine the best use for the Fairtrade Premium.*

Tools to select projects can include needs assessments, setting of priorities, feasibility studies and cost analysis.

Further guidance can be found in the Explanatory Document to this Standard for the FPC.

2.1.18 *The Fairtrade Premium Committee **must monitor** and **report** annually on the activities carried out with Fairtrade Premium money (Fairtrade Premium plan 2.1.15) and on the progress of existing projects to the general assembly of workers. The report must be documented and include at least the following information:*

- *Details on overall Fairtrade Premium income received, expenditures and balance;*
- *A description of each project that is planned, on-going concluded within the last reporting cycle;*
- *Were the activities carried out, yes or no? If not, why?*
- *When were they carried out?*
- *At what cost?*
- *Was the objective achieved or are any further actions needed?*

Guidance: *The intention of this requirement is that the FPC is accountable to the workers on the Premium plan, and the success of the plan can be evaluated. The report should be compiled based on the regular monitoring and evaluation of the Premium projects.*

Sample plans and reports are also provided below as examples of how these templates can be used.

It is not necessary that you use these templates in order to comply with the requirements, but they can help to give you a starting point, guide you through the process and provide you with ideas.

As part of your planning, ensure that General Assembly meetings are held at an appropriate time so that budgets can be approved on time i.e. if the financial year starts in January then the budget should be approved before this. Similarly reporting procedures should be carried out in a timely fashion.

All work plans and reports should be written in the appropriate language and should be communicated/made available to all workers through the use of notice boards as well as in General Assemblies.

Photographs can also act as an important reporting tool, providing insight into the projects, and allowing workers to visibly see what has been carried out using Premium funds.

Banana HL organizations must send the completed reports to bananas@fairtrade.net at least once a year and latest one month after the general assembly organized by the Fairtrade Premium Committee.

Fairtrade Premium Plan Template

Fairtrade Premium Plan										
Name of organization: [_____] FLO ID: _____										
Financial year: 2014-15										
Action What do you want to do?	Objective What do you want to achieve from the chosen action?	Target group Who will benefit from the action and how many do you aim to reach?	Selection tools What tools did you use to select the action?	Activities What activities do you aim to carry out to achieve your objective?	Timeline		Person responsible Who will be responsible for carrying out the action?	Monitoring How will you monitor the project?	Total budget How much money do you want to spend in total on this project?	Annual budget How much money do you want to spend this financial year on the project?
					Start date When do you aim to start the project?	End date When do you aim to complete the project?				

Date of approval by the General Assembly:

Signature Chairman:

Signature Treasurer:

Fairtrade Premium Activities Reporting Template

		Fairtrade Premium Report					
		Name of Organisation: [_____] FLO ID:					
		Year of reporting: 2014/15					
Action	Report on activities	Budget planned	Amount spent	Explanation if any variation	Target group and number of beneficiaries reached	Status	Evaluation, learnings from the project

Date of reporting to the General Assembly:

Signature Chairman:

Signature Treasurer:

Example of a Fairtrade Premium Plan

Fairtrade Premium Plan										
Name of organization: [Bugoza Fairtrade Community Group]						FLO ID: 12345				
Financial year: 2014-15										
Action	Objective	Target group	Selection tools	Activities	Timeline		Person responsible	Monitoring	Total budget	Annual budget
					Start date	End date				
What do you want to do?	What do you want to achieve from the chosen action?	Who will benefit from the action and how many do you aim to reach?	What tools did you use to select the Action?	What activities do you aim to carry out to achieve your objective?	When do you aim to start the project?	When do you aim to complete the project?	Who will be responsible for carrying out the action?	How will you monitor the project?	How much money do you want to spend in total on this project?	How much money do you want to spend this financial year on the project?
<i>Build a classroom for Chicosa Secondary School</i>	<i>Children in the surrounding community will have a suitable place to study.</i>	<i>Workers children as well as other children in the surrounding community. Ca. 50 students</i>	<i>Needs assessment, setting of priorities.</i>	<i>Carry out a tender process to choose best contractor. Build classroom in line with District specifications</i>	<i>Jan 2015</i>	<i>May 2015</i>	<i>Education sub committee</i>	<i>Weekly inspection briefs submitted throughout project to FPC office by the subcommittee. Internal audit committee to review finances and carry out final inspection.</i>	<i>Estimated: 10,000</i>	<i>Estimated: 10,000</i>
Date of approval by the General Assembly: Signature Chairman: Signature Treasurer:										

Example of a reporting template for Fairtrade Premium activities.

		Fairtrade Premium Report					
		Name of Organisation: Bugoza Fairtrade Community Group				FLO ID: 12345	
		Year of reporting: 2014/15					
Action	Report on activities	Budget planned	Amount spent	Explanation if any variation	Target group and number of beneficiaries reached	Status	Evaluation, learnings from the project
What did you do?	What activities were carried out?	What was the planned and approved budget	How much has been spent to date	If the budget planned and the amount spent differs, explain why.	Who has benefitted from the action and how many have you reached?	Has the action been completed? If not what is the current status and why?	Has the objective been achieved? What could have been done better?
A classroom was built for Chicosa Secondary School	A tender process was successfully carried out and awarded to Build Better Ltd. A classroom was built for 30 students including desks and chairs.	10,000 originally approved. Extra 500 approved on 12.04.15	10,320	The school requested that desks and chairs be provided. The extra cost was approved by the an Extra General Assembly meeting held on the 12.04.15 (see minutes attached)	Workers children as well as other children in the surrounding community. Classroom for 30 students	The project was completed by the third week of May 2015 and the handover ceremony was done on the 20th May 20145(see photos on FPC notice board). The desks and chairs are not yet completed and will be finished on the 20th June 2015.	A more comprehensive needs assessment could have been carried out which would have identified that desks and chairs were required at the start of the project which would have saved the need for an EGM and would not have delayed the use of the classroom by students at the beginning of the year.
		Date of reporting to the General Assembly: 15th June 2015 Signature Chairman: Signature Treasurer:					