

ISLAND SUSTAINABLE TOURISM ACTION THROUGH RESILIENT SMEs

I-STARS

OPEN CALL FOR APPLICATIONS

Grants Scheme for Tourism Businesses

**ANNEX V: Monitoring Reporting templates for MSMEs &
Sustainability Experts**
**(to be filled in online after award, during and after completion of
sustainability journey)**

Version 2.0
16 October 2023

Disclaimer

This publication is co-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 EIMSMEA - European Innovation Council and MSMEs Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

HISTORY OF CHANGES			
Version	Publication Date	Change	Page
1.0	19.07.2023	Initial version	
2.0	16.10.2023	Extension of deadline from 25/10/23 to 15/11/2023, 17:00 CET	

1. MONITORING REPORT TEMPLATES DURING SUSTAINABILITY JOURNEY

1.1 ADDRESSED TO MSMEs

Dear Madam/Sir,

You have been awarded the I-STARS Grant in order to assist your tourism business transition to sustainability.

We would like to ensure that your journey towards sustainability is not bumpy, that the journey runs smoothly according to plan and that you will reach your destination.

For this reason, you are requested to provide updates throughout your transition journey in order to enable us monitor your progress made and take any appropriate steps for the smooth implementation of your journey.

It is now time that you fill in and submit to us the below short questionnaire by **xxx** the very latest.

Thank you for your time and collaboration.

1. Company Name:

2. Contact person:

3. Sustainability Expert Name & Contact details:

Name & Surname

Company Name (if not available please write N/A)

4. Briefly describe the objectives and scope of your sustainability journey:

5. List the major milestones and deliverables of your sustainability journey:

6. Provide the expected completion dates & current status for each milestone/deliverable:

MILESTONE / DELIVERABLE TITLE	EXPECTED COMPLETION DATE (dd/mm/yyyy)	CURRENT STATUS (Not started, In progress, Completed - % of completion)

7. Issues and Challenges. Identify any issues, challenges, or obstacles encountered during the sustainability journey to date. Describe the impact of these issues on the project timeline or deliverables. Specify any mitigation strategies or actions taken to address the issues.

8. Risk Assessment. Identify potential risks that may impact the journey progress or success. Outline the mitigation measures or contingency plans in place for each risk.

9. Next Steps. Summarize the immediate next steps and tasks to be undertaken, including expected dates of completion.

10. Overall Project Status. Provide a brief summary of the journey's current status. Indicate if the journey is on track, delayed, or ahead of schedule. Highlight any critical areas requiring attention.

11. Additional Comments. Add any additional comments or observations relevant to the journey progress.

Submit

Thank you!

1.2 ADDRESSED TO SUSTAINABILITY EXPERTS

Dear Madam/Sir,

You have been chosen to act as the Sustainability Expert under the I-STARS Grants in order to assist a tourism business transition to sustainability.

We would like to ensure that your collaboration with the business is not bumpy, that the sustainability journey of the business runs smoothly according to plan and that you will reach your destination.

For this reason, you are requested to provide updates throughout your collaboration in order to enable us monitor your progress made and take any appropriate steps for the smooth implementation.

It is now time that you fill in and submit to us the below short questionnaire by **XXX** the very latest.

Thank you for your time and collaboration.

1. Sustainability Expert Company Name (if applicable):

2. Sustainability Expert Contact person:

3. Name & Contact details of the tourism business you are supporting:

Name & Surname

Company Name (if not available please write N/A)

4. Briefly describe the objectives and scope of your sustainability journey:

5. List the major milestones and deliverables of your sustainability journey:

6. Provide the expected completion dates & current status for each milestone/deliverable:

MILESTONE / DELIVERABLE TITLE	EXPECTED COMPLETION DATE (dd/mm/yyyy)	CURRENT STATUS (Not started, In progress, Completed - % of completion)

7. **Issues and Challenges.** Identify any issues, challenges, or obstacles encountered during the sustainability journey to date. Describe the impact of these issues on the project timeline or deliverables. Specify any mitigation strategies or actions taken to address the issues.

8. **Risk Assessment.** Identify potential risks that may impact the journey progress or success. Outline the mitigation measures or contingency plans in place for each risk.

9. **Next Steps.** Summarize the immediate next steps and tasks to be undertaken, including expected dates of completion.

10. **Overall Project Status.** Provide a brief summary of the journey's current status. Indicate if the journey is on track, delayed, or ahead of schedule. Highlight any critical areas requiring attention.

11. **Additional Comments.** Add any additional comments or observations relevant to the journey progress.

Submit

Thank you!

2. FINAL REPORT TEMPLATES (to be completed after completion of sustainability journey)

2.1 ADDRESSED TO MSMEs

Dear Madam/Sir,

Congratulations! You have completed your sustainability journey!

We would like to learn all about your experience, any lessons learned from this journey, and your plans for the future in as far as sustainability is concerned.

For this reason, you are requested to fill in and submit to us the below **questionnaire and financial report** by **dd/mm/yyyy** the very latest, in order to be able to proceed with the payment of your I-STARS Grant.

Thank you for your time and collaboration.

1. Company Name:

2. Contact person:

3. Sustainability Expert Name & Contact details:

Name & Surname

Company Name (if not available please write N/A)

4. I-STARS Grant implementation period. Please indicate starting and ending date of your sustainability journey (dd/mm/yyyy – dd/mm/yyyy).

5. Key Achievements. Please provide a summary of the main achievements, outcomes, or results obtained during your sustainability journey. Highlight key statistics, improvements, or positive changes observed.

6. Benefits. How did achieving above outcomes/results benefit your tourism business?

7. Challenges Faced. Please outline any challenges or obstacles encountered during your sustainability journey and how they were addressed or mitigated.

8. Lessons Learned. Please share important insights gained throughout your sustainability journey, including strategies that proved effective, areas for improvement, and any unexpected outcomes.

9. Next Steps. Do you intend to maintain the results/impacts of services funded through the I-STARS Grant? Do you plan to continue/pursue further/additional sustainability activities? Please elaborate.

10. Overall satisfaction status. Please rate your level of satisfaction in relation to below aspects on a scale of 1 to 5, where 1 indicates “Strongly Disagree” and 5 indicates “Strongly Agree”:

The services provided met the objectives outlined in the I-STARS Grant scheme.

The quality of the services received was satisfactory.

The services were provided in a timely manner.

The Grant guidelines and requirements were clearly communicated.

The communication with the I-STARS Grant Local Implementing Agency was effective and efficient.

The support provided by the I-STARS Grant Local Implementing Agency was helpful.

The I-STARS Grant scheme contributed positively to the sustainability performance of my business.

11. Additional Comments. If you have any additional comments or suggestions regarding the I-STARS Grant scheme, please share them below.

12. Quote. Please write a quote which describes your overall experience throughout the sustainability journey offered through the I-STARS Grant Scheme. We would like to publicise this quote and share your experience with other tourism businesses and stakeholders to inspire them shift towards more sustainable and responsible management through the uptake of certification schemes and the implementation of innovative solutions for sustainable tourism.

13. Financial Report & Supporting Documents. Please upload in PDF format:

- the signed and dated Financial Report, including all supporting documents (invoices, receipts, bank transfer payments – payments made in cash are not allowed);
- copies of Deliverables/Services provided through the I-STARS Grant Scheme (e.g. report on activities and measures carried out, studies/strategies developed, Certificate issued by Certification body, document proving application to acquire certification within Grant validity period, photos of tools, Agenda of training, Certificate of attendance issued by training provider, etc.).

By submitting this Final Report, you acknowledge that all information provided is accurate, true and complete.

Submit

Thank you for submitting your I-STARS Final Progress and Financial Report! Please allow up to 30 working days to process your report. Upon approval, we will notify you and proceed with the payment of your I-STARS Grant amount.

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Grants Scheme for Tourism Businesses

FINANCIAL REPORT FORM

(to be printed out, signed, dated and uploaded in PDF format)

Version 2.0
16 October 2023

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HOW TO SUBMIT YOUR FINANCIAL REPORT FORM

- **Step 1:** fill in the financial report form below, print, sign and date it.
- **Step 2:** save your signed version of the financial report form in PDF format.
- **Step 3:** submit your PDF financial report form as an attachment to your online Final Report.

Please report all costs related to acquiring each of the activities/services you have implemented through the I-STARS Grant Scheme.

IMPLEMENTED SERVICE/ACTIVITY	SPECIFY EACH IMPLEMENTED DELIVERABLE (e.g. Ecolabel certification, food waste audit, water conserving fixtures, etc.). Refer to 'Guide for Applicants', section 3.3.3 Eligible Activities.	DATE OF PAYMENT & RECEIPT NUMBER (payments in cash and/or cheques are ineligible)	SUSTAINABILITY EXPERT / SOLUTION PROVIDER (name, telephone, email address)	COSTS OF IMPLEMENTED SERVICES / ACTIVITIES * €
Sustainability certification scheme				
Sustainability Strategy Plan(s)				
Organisation Environmental Footprint				
Tools/Software/Technology solution				(max. 20% of Grant amount)
Training & capacity-building activities				(max. 20% of Grant amount)
TOTAL COST OF IMPLEMENTED SERVICES				€
TOTAL GRANT AMOUNT REQUESTED (max. €5,600)				€

*** NOTE:** VAT is eligible only in the case it is non-deductible by the enterprise. In such a case, supporting evidence must be attached (Certificate or similar statement from the VAT authority of your country). If VAT is deductible, please exclude it from above amounts – double funding is strictly forbidden.

By submitting this Financial Report Form:

- ☐ I declare that all information and data provided in this form and all supporting documents (invoices, receipts, bank transfer payments, etc.) is accurate and true.
- ☐ I declare that the service(s)/activitie(s) listed above have NOT benefitted from any other EU, national/regional/local, international grant, as double funding is strictly forbidden.
- ☐ I understand and accept to keep records and other supporting documents related to this Financial Report form for at least 5 years after final payment from the EISMEA to the I-STARS Consortium.

Company Name	
Business address (street, city, country)	
VAT number	
Legal Representative (Name & Surname)	

Please deposit the above-mentioned amount in the following bank account:

Account holder full name	
Name of the bank	
Address of the bank	
Bank account number	
Swift code	
IBAN code	

[Signature]

[Name & Surname of Legal Representative]

[Date]