



FAIRTRADE  
INTERNATIONAL

# Fairtrade Planning and Reporting Templates

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These templates can help you comply with requirements on the Development Potential section 4.1.1 – 4.1.10 and the reporting requirements in the Environmental Protection section 3.2.23, 3.2.34 and 3.2.40.

Using these templates, banana producers also comply with requirement 4.3.4. of the Fairtrade Standard for Fresh fruit for Small Producer Organizations.

It is not necessary that you use this template in order to comply with the requirements, but it can help you to have a starting point, guide you through the process and provide you with ideas.

## **FAIRTRADE DEVELOPMENT PLAN**

Section A is for **PLANNING** activities. You have to include as a minimum the activities that you plan to fund with the Fairtrade Premium (4.1.2).

In year 3 you are supposed to include at least 1 activity that benefits **workers** (4.1.7).

In year 6, you are supposed to include at least one activity to maintain or improve sustainable production practises within the **ecosystem** (4.1.9).

Section B is for **REPORTING** on **all** activities that are included in Section A. This report must be presented to your members in the General Assembly (4.1.6)

## **REPORTING ON ENVIRONMENTAL ACTIVITIES**

Section C is for **REPORTING** on activities that your organization and/ or individual members do to improve soil fertility (3.2.23), to maintain or enhance biodiversity (3.2.34) and to reduce GHG emissions and increase carbon sequestration (3.2.40).

This is a way to make your members, your buyers, the public and the certification body aware of things that you are already doing for the environment. In contrast to Section B, these activities do not have to be planned beforehand as they can be ongoing activities as e.g. growing coffee in agro-forestry systems. If you wish to do so, you can of course plan activities that you want to report on, in Section A of the template.

For a better understanding, examples for each section are provided at the end of the document.

Organization:  FLO ID: Year:	FAIRTRADE DEVELOPMENT PLAN: SECTION A PLANNING						
	Objective	Target group & number of beneficiaries	Timeline	Person responsible	Resources		
					Premium Budget	Other Budget	Total Budget
Action: <i>What do you want to do?</i>	<i>What do you want to achieve from the chosen action?</i>	<i>Who are you aiming to benefit with this project and how many do you plan to reach?</i>	<i>By when do you want to start and finish the action?</i>	<i>Who is responsible for carrying out the action?</i>	<i>How much of the Fairtrade Premium money do you want to spend on this action and for what? Please indicate currency</i>	<i>How much non Fairtrade Premium money do you want to spend on this action and for what?</i>	<i>How much money in total do you want to spend on this action?</i>
<b>Workers</b>							
<b>Maintain or improve sustainable production practises within the eco-system</b>							

Date approved by the GA:

Organization:  FLO ID: Year:	FAIRTRADE DEVELOPMENT PLAN: SECTION B REPORTING				
	Premium Expenses	Other Expenses	Total Expenses	Target group & number of beneficiaries	Self-evaluation
<b>Action:</b> <i>What did you do?</i>	<i>How much of the Fairtrade Premium money did you spend on this action and what did you spend it on?</i>	<i>How much non Fairtrade Premium money did you spend on this action and what did you spend it on?</i>	<i>How much money in total did you spend on this action?</i>		<i>Was the action carried out? When? How? At what cost? Objective achieved? Further action needed? Justification if the action was not carried out? What are the learnings?</i>
<b>Workers</b>					
<b>Maintain or improve sustainable production practises within the eco-system</b>					

Date approved by GA:

<b>Organization:</b>  <b>FLO ID:</b> <b>Year:</b>	<p><b>SECTION C REPORTING ON ENVIRONMENTAL ACTIVITIES</b></p> <p>This table can be used to report on environmental activities according to SPO requirements 3.2.23, 3.2.34 and 3.2.40. You are free to choose how you want to report on activities undertaken however this table can give you an idea and guide you through important aspects.</p> <p>Please note that reporting can be done in any form and this table is only intended to help you in case you need guidance. Reporting can also be done e.g. by videos, photos or a written report. Even if you choose another way to report, the aspects mentioned in this table can be helpful to guide you through the process and give attention to certain elements that might help you to improve the scope and impact of your activities.</p>			
	<b>Activity</b> <i>What did you as an organization or individual members do?</i>	<b>Impact</b> <i>What was the positive effect of the activity on the environment and on other aspects?</i>	<b>Scope / Size</b> <i>What is the reach of the activity?</i>	<b>Accompanying Documentation</b> <i>Please list any additional documents or visuals that help to understand the activity</i>
<b>Improve soil fertility</b> (SPO Requirement 3.2.23) Timeline Dev Year 3				
<b>Protect and enhance biodiversity</b> (SPO requirement 3.2.34) Timeline Dev Year 6				
<b>Reduce GHG emissions and increase carbon sequestration</b> (SPO requirement 3.2.40) Timeline Dev Year 6				

Organization: Example Cooperative A FLO ID: 12345 Year: 2011	FAIRTRADE DEVELOPMENT PLAN: SECTION A PLANNING						
	Objective	Target group & number of beneficiaries	Timeline	Person responsible	Resources		
					Premium Budget	Other Budget	Total Budget
<b>Action:</b> <i>What do you want to do?</i>	<i>What do you want to achieve from the chosen action?</i>	<i>Who are you aiming to benefit with this project and how many do you plan to reach?</i>	<i>By when do you want to start and finish the action?</i>	<i>Who is responsible for carrying out the action?</i>	<i>How much of the Fairtrade Premium money do you want to spend on this action and for what? Please indicate currency.</i>	<i>How much non Fairtrade Premium money do you want to spend on this action and for what?</i>	<i>How much money in total do you want to spend on this action?</i>
Ex: Purchase and deliver to members new trees for replanting.	Ex: Members can increase their production; have sufficient income to make a living.	Ex: All farmers in Zona Sur and Oeste, ca 50 families	Ex: 01-06/2011	Ex: Mrs. María Rodriguez	Ex: 1000 trees (\$3000)	Ex: Transport (\$100)	Ex: \$3100
Provide training to members on how to improve quality of coffee	Improve quality of coffee in order to respond to market needs. Ensure better prices for producers	Ex: All members, ca. 150	By 07/2012	Mr. Vijay Kumar	Ex: 5 workshops: 5x200\$ for transport, location and material= 1000\$ Trainer 5x 100\$ = 500\$	Ex: 0	1500\$
Ex: Purchase processing equipment.	Ex: Increase revenue for the organization by selling higher value products.	Ex: All members, 500	Ex: 01-10/2012	Mr. Husain Aswan	Ex: Fruit juice processor (\$8000)	Ex: Additional amount required for purchase (\$2000)	Ex: \$10000
Ex: Use Premium to pay for Fairtrade compliance costs.	Ex: Remain in the Fairtrade system.	Ex: Members, the organizatio	Ex: 01-11/2011	Ex: Mr. Jose Guerrero	Ex: Develop and implement trainings for members (\$1100).	Ex: \$0	Ex: \$1100

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<b>Workers</b>							
Ex: Provide literacy classes to workers.	Ex: Improve basic education.	Ex: Workers, 100	Ex: 05/2010-05/2011	Ex: Mrs. Afua Fuso	Ex: 0	Ex: Training facilitator (\$500); workbooks and other materials (\$200)	Ex: \$700
<b>Maintain or improve sustainable production practises within the eco-system</b>							
Ex: Monitor pests and the use of pesticides by members	Reduction of pesticide use	Ex: Members, Ca.100	Ex: By 12/2012	Ex: Sanjay Singh	Ex: Training on monitoring of pests and pesticide use (\$1000)	Ex: Training expert (\$250) Provide monitoring templates to members (\$100)	Ex: \$1350

Organization: Example Cooperative A FLO ID: 12345 Year: 2011	FAIRTRADE DEVELOPMENT PLAN: SECTION B REPORTING				
	Premium Expenses	Other Expenses	Target group & number of beneficiaries	Total Expenses	Self-evaluation (every year)
<b>Action:</b> What do you want to do?	How much of the Fairtrade Premium money did you spend on this action and what did you spend it on?	How much non Fairtrade Premium money did you spend on this action and what did you spend it on??	Who and how many benefitted from this project?	How much money in total did you spend on this action?	Was the action carried out? When? How? At what cost? Objective achieved? Further action needed? Justification if the action was not carried out?
Ex: Purchase and deliver to members new trees for replanting.	Ex: 500 trees (\$1500)	Ex: Transport (\$200)	Ex: Members, 25 families	Ex: \$1700	Ex: -The purchase of 500 trees and delivery to members was successfully carried out, 500 trees will be delivered next year. -The delivery of 500 trees was carried out on time and final deliveries were done by the end of 06/2011. -Our organization's truck made 5 separate deliveries to different groups of members, transport was more expensive than planned due to increased petrol prices -The total cost was exactly at \$1700 on total budget, including \$1500 Premium money and \$200 non-Premium money. -Members will now work towards achieving the objective by using the new trees to increase production. -This action is not complete and will be carried over to next year's Fairtrade Development Plan (delivery of 500 trees). Remaining Premium budget: 1500\$
Provide training to members on how to improve quality of coffee	5 workshops = 900\$ Trainer 5x 100\$ = 500\$	0\$	All members, 153 participants	1400\$	Ex: - 5 workshops were successfully carried out - Costs for transport and material was a little bit cheaper than expected Members requested to continue with the training and also extend training activity to improving productivity, this will be taken on in next year's Development plan Remaining Premium budget: 100\$

Ex: Purchase processing equipment.	Ex: Fruit juice processor (\$0)	Ex: Additional amount required for purchase (\$0)	NA	Ex: \$0	Ex: -This action was not carried out. -It was decided in our General Assembly that the purchase of processing equipment would not increase revenue because the business of value added products is not viable for our organization at this time. Remaining Premium budget: 8000\$
Ex: Use Premium to pay for Fairtrade compliance costs.	Ex: Develop and implement trainings for members (\$1100).	Ex: \$0	The organization	Ex: \$1100	Ex: -This year we used Premium money to pay for compliance costs related to training on environmental requirements. However, we have not yet fully given training to all members. This was due to our staff not having enough time. -We plan to carry over the implementation into next year's Fairtrade Development Plan.

### Workers

Ex: Provide literacy classes to workers.	Ex: Training facilitator (\$300)	Ex: Training facilitator (\$200); workbooks and other materials (\$200)	100 workers	Ex: \$700	Ex: -Literacy classes were scheduled and delivered to all workers. -From January to May 2011 the workers received bi-weekly, one hour and a half hour classes. -Workers gathered at an agreed destination and the classes took place. -The total cost was \$700 because the training facilitator only cost \$500. \$300 of Premium money ended up being spent on this action. -This objective was achieved but the workers have requested this action to continue. We plan to continue this action in next year's Fairtrade Development Plan.
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### Maintain or improve sustainable production practises within the eco-system

Ex: Monitor pest and the use of pesticides by members	Ex: Training on monitoring of pests and pesticide use (\$1000)	Ex: Training expert (\$250) Provide monitoring templates to members (\$100)	54 members	Ex: \$1350	Ex: Yes, training was carried out, but was more expensive than expected, only 50% of the members could be trained We will carry on with the activity provided that we have funds for next year as some results in the reduction of pesticides can already be observed
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<b>Organization:</b> <b>Example Cooperative A</b> <b>FLO ID: 12345</b> <b>Year: 2011</b>	<b>SECTION C REPORTING ON ENVIRONMENTAL ACTIVITIES</b>			
	<b>Activity</b> <i>What did you as an organization or individual members do?</i>	<b>Impact</b> <i>What was the concrete positive effect of the activity on the environment and on other aspects?</i>	<b>Scope / Size</b> <i>What is the reach of the activity?</i>	<b>Accompanying Documentation</b> <i>Please list any additional documents or visuals that help to understand the activity</i>
<b>Improve soil fertility</b> (SPO Requirement 3.2.23) Timeline Dev Year 3	Ex: Members use green manure and thus decrease the use of mineral fertilizers	Ex: Soil fertility is improved on a sustainable basis (increases soil organic matter content) Dependence on external inputs is reduced GHG emissions reduced	Ex: 2/3 of the members use green manure on their Fairtrade fields; as they achieve good results with it, they increasingly also use it on their other crops	Ex: Impact study by local university: samples of the soil were analysed and quality of the soil increased overtime
<b>Protect and enhance biodiversity</b> (SPO requirement 3.2.34) Timeline Dev Year 6	Ex: Fairtrade Coffee is grown in Agro-forestry systems	Ex: Coffee grows in natural state, variety of other crops is grown alongside (timber, fruits, beans), nutrition of family is enhanced with greater variety and healthier food, food autonomy is increased	Ex: All coffee is grown in agro-forestry systems (1025 has)	Ex: Photos of agro-forestry fields
<b>Reduce GHG emissions and increase carbon sequestration</b> (SPO requirement 3.2.40) Timeline Dev Year 6	Ex: Members install live fences by planting bushes around their fields	Ex: Increase carbon sequestration by increasing vegetation Restoration of local plants	Ex: Increasing number of members take part, currently 20% of the area	Ex: photos