



Fair Trade
ACADEMY™

CHECKLIST OF BEST PRACTICES FOR IMPLEMENTING THE PREMIUM PLAN



Purpose:

To provide the Fair Trade Committee with **a set of recommendations** for the implementation of **Premium Plan** projects so that they can be aware of and **anticipate** key **actions** in the process.

Description:

This tool is a checklist of suggested activities and **best practices** that Fair Trade Committees can consider **after the approval of their Premium Plan at the General Assembly.**

Through this list we seek to guide the Fair Trade Committee through the actions that are necessary **at the beginning of their projects, when making purchases, when establishing agreements with third parties, during the implementation of projects, and throughout monitoring.**

This is a general list, therefore, each Fair Trade Committee can identify the activities and good practices that pertain to their specific projects.

Materials required:

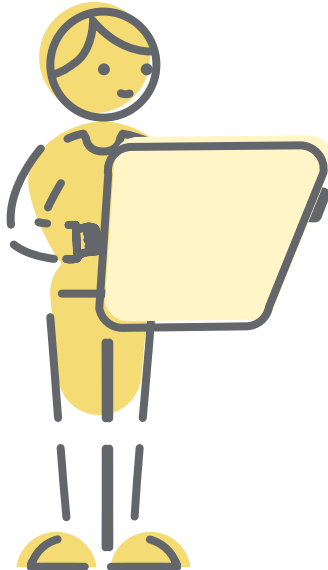
- A hard copy of each of the lists of best practices. You can also use this tool digitally by opening it in a PDF editor such as Acrobat.
- Pen or pencil.
- Eraser if necessary.

Time:

It is suggested that these lists be used during the meeting that the Fair Trade Committee holds to plan their projects. They can be used while the Fair Trade Committee is developing the plan, or as a review checklist for the end of the planning process. This tool helps the committee allocate the appropriate time for each step.

PROCEDURE

1. According to the diagram below, identify the stage your Premium Plan projects are in.
2. Thoroughly read the lists that correspond to the stage you identified, and then print them out.
3. Review and check each of the boxes on the list(s) in order to foresee the actions you can take for each project. Keep in mind that this is a general list of activities and best practices, so it is possible that many of the suggested activities do not correspond to your projects.









CHECKLISTS OF BEST PRACTICES FOR IMPLEMENTING THE PREMIUM PLAN

- Checklist 1** - Starting the Projects
- Checklist 2** - Shopping or Searching for Suppliers
- Checklist 3** - Establishing Agreements with Third Parties
- Checklist 4** - Project Implementation
- Checklist 5** - Things to Anticipate for Monitoring Projects

Checklist **1** Starting the Project

For many Fair Trade Committees, starting projects can be a challenge because there are many steps and factors to consider. When initiating Premium Plan projects it is important to keep the following in mind:

-  To **determine the knowledge, experiences, interests and skills** of each of the **members** of the Fair Trade Committee.
-  **Assign specific responsibilities and tasks** to each member of the Fair Trade Committee based on their knowledge, experience, interests and skills.
-  Ensure that your **Premium Plan includes objective, expected results, measurement criteria, activities, responsible parties, deadlines and a budget**, as well as other complementary information.
-  **Always have your Premium Plan on hand** as this will be your guide throughout the project.
-  **Develop a project charter** for the project in the Premium Plan. This will help inform Fair Trade Premium Participants about **how the project will work**, avoiding misunderstandings, confusion and complaints. It aids in documenting transparency and ensures that there is no discrimination regarding access to project benefits.
-  Make a **list of the risks and setbacks** that could arise in the project and **detail possible ways to overcome them** and who would be the ideal people to resolve them.

It is recommended that **all persons** involved in the project **make field visits to learn more about the beneficiaries' reality** and the place where the project will be implemented.

It is suggested to **talk to the beneficiaries** about the projects to learn more about how it relates to their **situation and needs**.









It is highly **recommended to have one or several specialized consultancies with experts in the subject of the project**, particularly if it is a complex project, a large investment and/or requires specialized technical knowledge.

It is recommended to **develop a letter of presentation about the project**, and even develop business cards for the individual most in charge. The business cards should include contact information or the Fair Trade Committee's general information, such as their, phone number, email, and address. This increases the formality and credibility of the project, thus, facilitating agreements with suppliers.

It is a good idea to **establish a communication channel accessible to everyone** - both Fair Trade Committee members and Premium Participants - where information regarding the progress of the projects can be shared.

Checklist **2** Shopping or Searching for Suppliers

For many, starting to look for services, suppliers, or the products needed for projects can be a complicated task. Here are some ideas on how to move forward:

-  **Define who** among the members of the Fair Trade Committee **will request price quotations and make purchases.**
-  **Define the storage locations for purchases** and assign a person responsible for their safekeeping.
-  **Identify** possible **suppliers** for each project. It is recommended to **compare them** according to their **costs, coverage, shipping costs, invoicing methods, payment methods, guarantee, reliability, professionalism** and other aspects of interest. If necessary, it is recommended to visit the supplier and their facilities to get more information about them and check their reliability.
-  **Request** at least three **quotations for the products or services** you need to purchase with date, supplier's name and itemized costs.
-  **Keep the quotations** for your **records.**
-  It is a good idea to **ask suppliers for quotations** in order to negotiate a more affordable price, higher quality, shorter delivery period or longer after-sales warranty period as needed.
-  **Compare quotations on price, but also on quality.**
-  **Save the purchase receipts** to have a record, if they are printed receipts it is recommended to scan them or take a picture to avoid losing them.

Checklist **3** Establishing Agreements with Third Parties

For some projects it is necessary or advisable to link up with people or organizations that can provide some type of service or product. This alliance requires special care and extra activities. Here are some ideas on how to do it:

- Decide which** of the members of the Fair Trade Committee **will be the intermediary between communications** with the parties.
- Identify public and private organizations that are working towards the same goal as one of the projects in the Premium Plan** and discuss whether what they do could be of value to the project, as well as how they could contribute. It may be a good idea to start looking locally or nationally.
- Meet with the organizations to better understand what they do** and learn about their interest, and determine how feasible it would be to join forces.
- Visit or physically meet the work of the organizations** to verify if it is what the committee is looking for in terms of support.
- Negotiate agreements** with both parties and **develop a document** defining the duration, scope, rights, commitments, and duties.
- All collaboration agreements should be **documented and signed**.
- Store agreements** in a safe place.

Checklist **4** Project Implementation

The implementation of the projects is a very important moment for the Fair Trade Committee because it takes time, effort, and resources to achieve the objectives and see results. At this time, it is important to maintain focus on certain actions:

- Maintain a **record of the direct and indirect beneficiaries of the projects**, as well as **detailing** the support and **benefits granted**.
- Maintain a **record of expenditures being made**.
- Maintain a **record and file** of all **invoices and expense notes**.
- Maintain a **photographic record** of all project milestones.
- **Inform** all beneficiaries of **the progress of the project**, either at the General Assembly or other information channels such as a mural or bulletin board, poster, posters, flyers or messages through a WhatsApp group.
- Constantly **check** that the **activities** that are written in the **Premium Plan are being accomplished** on time.

Checklist **5** Things to Anticipate for Monitoring Projects

As the projects progress it will be important to consider some tasks that will allow you to make a successful evaluation:

- Collect and organize all documents, records, photos, and expenses related to the implementation of the project.** These will be necessary to evaluate progress and be accountable to the Fair Trade Premium Participants. In other words, keeping an orderly file is very important.
- Anticipate and request the information to be evaluated** in order to have the data available for analysis and discussion at the meeting.
- If **partnerships** have been made **with organizations outside** the committee, **request the documents** that are under their management and analyze them together prior to the Fair Trade Committee meeting.
- Schedule the Premium Plan monitoring meeting in advance**, seeking the presence of the majority of the Fair Trade Committee members.