



# Guide to Reporting Premium use



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# Welcome

We appreciate the continued dedication of Fair Trade Committees and Certificate Holders around the world. Your efforts make it possible to implement Premium Plans that bring meaningful benefits to individuals, families, and entire communities.

To continue strengthening the trade networks that support producers, Fair Trade USA requires Certificate Holders to report information about the impact of their Premium investments. The Partner Portal makes this process easier by allowing you to report project details and other Premium uses in one place, the Premium Dashboard.

In this guide, you will find step-by-step instructions on how to report through the portal, along with examples of completed reports to support you throughout the process.

Fair Trade USA welcomes your feedback and suggestions to keep improving. Email us your comments at: [infoftcert@fairtradeusa.org](mailto:infoftcert@fairtradeusa.org).



# Introduction

## What is the Premium Dashboard?

The Premium Dashboard is a section of the Partner Portal used to report how Fair Trade Premium funds are used, based on the Premium Plan approved at the General Assembly of Premium Participants.

## Who is this tool for?

All Fair Trade USA Certificate Holders with an approved Premium Plan – including those certified under the Agricultural Production Standard (APS), Capture Fisheries Standard (CFS), and Factory Production Standard (FPS).

The Premium Dashboard is also available to producers participating in the APS Recognition Program for Fairtrade International certified organizations.

## What type of Premium use should be reported?

All Premium use included in the Premium Plan that was approved at the General Assembly of Premium Participants must be reported. This includes Premium projects but also other types of use allowed by the Fair Trade Standards.


## When must the Premium Dashboard be used?

You must report Premiums use at least once per year. Reporting must be completed after the General Assembly of Premium Participants and **no later than December 31** each year, to:

- Update completed projects/use from the previous year, and
- Add all projects/use approved for the current year.

## Important Considerations Before Starting

Before beginning the reporting process, make sure the person responsible for reporting Premium use has the following:

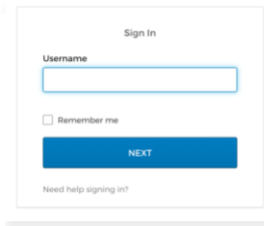
- Access to the Partner Portal
  - If the person does not have an account to access the Partner Portal, please contact Fair Trade USA through the Help Center at the following [Link](#). 
- The latest General Assembly information
  - You will need the information from the last General Assembly at hand, including the report/evaluation of the Premium plan for the past period, and the details of the approved Premium plan for the current period.
- Photos or documents ready to upload
  - You may also have photographs, videos and documents that showcase the impact generated. These resources and media may be used by Fair Trade USA to share Premium impact stories with buyers, so please make sure photos are high quality, visually appealing, and that you have authorization to share photos of individuals.

# How to Update the Premium Dashboard

The description below offers a step-by-step guide for the annual update of the Premium Dashboard. Each step describes the actions required in the Partner Portal—from logging in to completing the annual report.

## Summary of the sequence of steps to add Premium use/projects

- 1 Log in to the **Partner Portal** and access your account by entering your username.

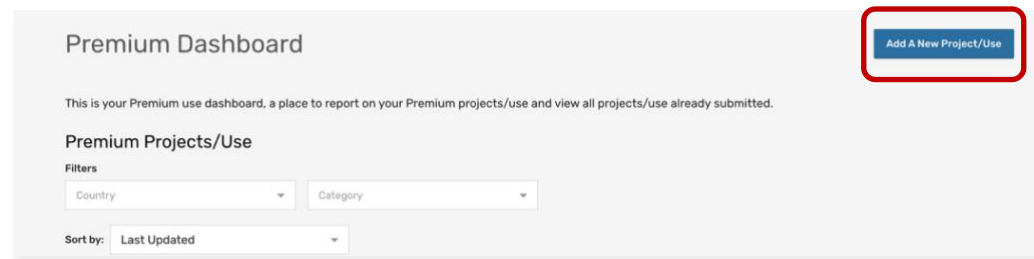
A screenshot of the 'Sign In' form in the Partner Portal. It features a 'Username' input field, a 'Remember me' checkbox, a blue 'NEXT' button, and a link for 'Need help signing in?' at the bottom.

- 2 Go to **“Premium Dashboard”** in the upper menu bar or select the **“Premium Dashboard”** box.



**Premium Dashboard**  
Create and report Fair Trade USA Premium Projects and Use, as well as access project/use history and insights.

- 3 Add the approved Premium use/Projects, selecting **“Add a New Project Use”**. Enter the information required in the form and select **“Save”**.

A screenshot of the Premium Dashboard interface. At the top right, there is a blue button labeled 'Add A New Project/Use' which is circled in red. Below the button, the text reads: 'This is your Premium use dashboard, a place to report on your Premium projects/use and view all projects/use already submitted.' Underneath, there is a section titled 'Premium Projects/Use' with 'Filters' for 'Country' and 'Category', and a 'Sort by' dropdown menu set to 'Last Updated'.

You will have to repeat this as many times as use/Projects you have in the Premium Plan approved in the year reported.

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Update the information for projects from the previous year that are completed at the time of reporting, selecting **“View Project/Use”**.

In the project form that contains all the information of the project, you have to do two things:

- a) In Manage Premium Spend, select **“Add Update”** to enter the total Premium spent on the project/use.

Note that if the project had expenses during a period including two calendar years, you will have to enter and save the information for each calendar year separately. See examples in the next section for more details.

- b) Select the editing icon to update **“Total Number of Beneficiaries”**. You may also want to update the status of the project, the end date and the results.

Please also include media showing the activities and or the results of the project/use.

Once all updates for the Premium project/use are entered, select **“Save”**.

You will have to repeat this as many times as projects/uses you had in the Premium Plan of the year previous to the one reported.

Project ID: PP-004484 | Start Date: 01 Jan 2022 | Category: Employee Welfare & Services | Spend to Date: 2,347 PEN | # of Beneficiaries: 10 | Status: Completed

**View Project/Use**

Project/Use Description: CECANOR, es una organización de primer grado que cuenta con socios y socias en tres regiones del norte del país, por lo que para garantizar la participación activa de todos se ha optado por conformar Comités en cada comunidad donde opera, distritos y regiones.

Need for the Project/Use: Garantizar la participación de los socios en los diferentes niveles de organización: comunidad, distrito y región. La participación en CECANOR es a través de delegados.

Expected Results of the Project/Use: Los socios y socias conocen el quehacer de la organización, reciben información y toman parte de las decisiones a través de sus dirigentes y delegados.

Results of the Project/Use: Fair Trade Committee

Project/Use Details: Project ID: PP-004481, Country Benefitted: Peru

Resources: Video Tutorial for Creating Premium Projects, Guide to Reporting Projects, Examples of completed projects

Manage Premium Spend: Record premium amounts spent according to the premium plan. View most recent and previous Premium spend reporting below. Add an update by clicking the button.

**Add Update**

31 Dec 2022 | Reporting Period: 01 Jan 2022 - 31 Dec 2022 | Premium Spent to Date: 178,212 PEN

Reporting Period

Enter a date range and the amount spent for this spend update. Dates must be in the same calendar year and within the general assembly approval and end dates. Premium spend should only include amounts approved in the premium plan.

Start Date: [ ] to End Date: [ ]

Premium Spent \* [ ] Currency: PEN

Important: Please make sure the currency you entered for your project is correct. After saving this update, you will not be able to edit the currency setting for your project.

**SAVE**

# Examples of Premium Project/Use

Name of the field	Example 1: School Bus Purchase
Project/Use Description	<p>Purchase of a school bus to provide free transportation for students who are children of workers to the community of Piedra Grande, where the area's educational centers are located. The bus runs routes during the morning and afternoon to ensure the students' commute to and from school.</p> <p>The project includes hiring a driver, as well as other related expenses such as vehicle maintenance, fuel, insurance, and obtaining permits, among others.</p> <p>The service provided will be 100% covered by the Fair Trade Premium.</p>
Need for the Project/Use	<p>After conducting a Needs Assessment through a survey, it was found that 85% of workers face difficulties sending their children to educational units, as the community where they live lacks schools. For this reason, students must travel to the community of Piedra Grande, six kilometers away; many do so on foot, while a few use bicycles or their own vehicles. On average, students spend four hours a day commuting to and from the educational centers.</p> <p>Additionally, the distance causes school-age children to drop out of education. The Needs Assessment found that 18% of the children of Premium Participants do not attend school due to the distance.</p>
Expected Results of the Project/Use	<p>To facilitate the transportation of workers' children to the educational centers located in the community of Piedra Grande. This includes both the students currently attending schools in that community and those children and youth who are not currently studying; therefore, the project expects to increase access to education for the workers' children. In addition to facilitating student transportation, the project aims to ensure that the commute is safe for students and supports their parents' finances.</p>
Results of the project/use*	<p>A transport unit with a capacity for 54 passengers was purchased. A local driver with experience in student transportation was hired, who supported the Committee in selecting the vehicle and the permit acquisition process.</p>

	<p>From August, when the transport service began operations, through November, the school bus transported 96 students via four daily services—two in the morning and two in the afternoon. As a result, student commute times have been reduced to 30 minutes per trip. The project contributes to the school reintegration of workers' children who were not attending educational centers. During the first 4 months of the project, school non-attendance has dropped from 18% to 13%. The Committee is working toward the reintegration of more children and youth, although it anticipates that a single bus might not be enough, especially given the interest from students who are not children of Premium participants in using the school bus service.</p>
Country Benefited	México
State/Province/Region Benefited	Sonora, México
Project Status	Completed
Total Number of Beneficiaries	96
General Assembly Approval	January, 04, 2026
Project end date	09/20/2026
Planned Budget	900.000 Pesos MX
Currency	Mexican Pesos
Category and Subcategory	Other projects related to education and childcare

Name of the field	Example 2: Distribution of 50% of the Premium in Cash
Project/Use Description	<p>Distribution of 50% of the Premium in cash to adapt to the multiple needs of the workers participating in the premium.</p> <p>Cash distribution will be carried out by the company's payroll office. It is estimated that a one-time payment of 2,700 Mexican Pesos will be provided per worker, for a total of 650 workers, as part of the benefit of this project.</p> <p>The total amount of the Premium delivered will be 1,755,000 Mexican Pesos. The Fair Trade Committee will authorize the distribution of the Premium to the Payroll Department, following the procedures established between the Fair Trade Committee and the Certificate Holder's administration.</p>
Need for the Project/Use	<p>The results of the Needs Assessment show predominant needs in food, medicine, clothing, housing improvements, and educational needs for workers' children. Workers also mention a lack of funds to purchase household supplies they cannot afford. Furthermore, the workers come from 38 different communities, making it difficult to focus on a Premium project on a single need or just a few communities. For this reason, the committee considers that a cash distribution would allow addressing the needs of a larger number of Premium participants.</p>
Expected Results of the Project/Use	<p>That workers can satisfy their diverse individual needs, especially in terms of health, education, household supplies, and housing improvements—by using the financial resources provided to them. Under the cash distribution project, workers will have the funds to address their specific needs within their own communities.</p>
Results of the project/use*	<p>The money was distributed starting February 2, 2026, reaching a cash distribution of USD 150 per employee for 630 workers. Although the project had been planned for 650 workers, 20 workers from the harvesting area were not working at the company at that time, so steps will be taken to locate them.</p>

Country Benefited	México
State/Province/Region Benefited	Jalisco
Project Status	Completed
Total Number of Beneficiaries	650
General Assembly Approval	10/30/2025
Project end date	First week, January, 2026
Planned Budget	1.755.000 Mexican Pesos
Currency	Mexican Pesos
Category and Subcategory	Cash Distribution

Name of the field	Example 3: Ophthalmology Consultations
Project/Use Description	<p>The project consists of providing ophthalmological consultations for employees participating in the 'prima' program to promote eye health. For this purpose, consultations will be held with an ophthalmologist at a private clinic. If necessary, the project will cover complementary eye health exams and the provision of glasses or lenses.</p> <p>The initiative aims to promote ocular health by providing access to ophthalmologist consultations, vision assessments, and guidance on eye care.</p>
Need for the Project/Use	<p>The Needs Assessment inquired about vision difficulties among workers, as well as the regularity of their eye exams. The results showed that 48% admitted to having vision problems and indicated that they rarely visited a clinic specialized in eye health.</p>

Expected Results of the Project/Use	<p>The project is expected to contribute to the identification and correction of vision problems among participating workers, providing better eye health conditions and a higher quality of life.</p> <p>By conducting ophthalmological consultations, it will be possible to diagnose visual difficulties and guide employees on the appropriate treatment, including the need for glasses or complementary exams.</p> <p>The expected impact is an improvement in work performance, greater operational safety, and a reduction in vision-related difficulties, enhancing the quality of life for 'prima' participants.</p> <p>The project beneficiaries will be the unit workers who demonstrated a need for an ophthalmological evaluation.</p>
Results of the project/use*	The project, executed during the last week of February 2026, provided care for 221 'Prima' participants, of whom 103 people benefited from the purchase of glasses (lenses), 14 people benefited from complementary exams, and 9 people were referred for surgery, which will be covered by the Fair Trade Premium.
Country Benefited	Brazil
State/Province/Region Benefited	Rio Grande do Sul
Project Status	In progress
Total Number of Beneficiaries	221
General Assembly Approval	11/14/2025
Project end date	02/23/2026
Planned Budget	220.000 Brazilian Real
Currency	Brazilian Real
Category and Subcategory	Healthcare

# Frequently Asked Questions

- **If I have a project that repeats from one year to the next, how do I enter the information?**

Each year's project should be entered as a separate project. Once the project for that year has been completed, update it with the Premium spent, the number of beneficiaries, the project results, and the project status. If the same project is approved again in the following year's Premium Plan, create a new project for that year and update it once it is completed. Repeat this process each year for as long as the project continues to be approved as a recurring project.

- **What currency should I use for the report?**

Since the same currency must be used for both the budget and the expense report, use the currency in which your project expenses are actually paid.

- **What Project/use category and subcategory should I choose if none seems appropriate?**

Choose the project/use category and subcategory that most closely reflects the primary purpose of your project. If none is an exact match, select the closest available option.

- **If I entered and saved incorrect or incomplete information, how do I correct it?**

After saving the project, all registered projects will appear in the **dashboard**, click on the project you want to modify, then click on the "**Update**" button. There is no limit to the number of updates.

- **How do I know if my report was received by Fair Trade USA?**

All projects registered in the Partner Portal and fully completed will be automatically saved in the Fair Trade USA database. If there are any questions, Fair Trade USA will contact you via email.

- **What amount should I enter if the project has not started to be implemented?**

In this case, it is not necessary to enter any amount. You can enter a "spend update" the next time you update the project.

- **Can I report the information more than once per year?**

Yes, you can update your information at any time.

- **What do I do if my project is delayed and runs over the implementation period for the next annual plan?**

You can update the project and indicate that the implementation is delayed. Leave the project status as “**in progress**” and when it is completed, you can update the “**results**” section.

- **Who can see the information I enter?**

Only members of your organization who have access to the Fair Trade USA Partner Portal and Fair Trade USA staff members can view the information you enter.

- **How is the information I provide used?**

The information may be used to create impact reports that are shared with brands, buyers, prospective partners, and funders.

- **Why is it requested to attach photographs and videos of the projects and Premium uses?**

Photos and videos bring your project to life. They help Fair Trade USA show buyers and supporters the real difference that Premium investments make in your community. The more you share, the stronger the story we can tell together.

- **What happens when the project status shows as “Completed”?**

You **must** select an end date from the calendar. This should be the actual date the project was completed.

- **What happens if the project status is not “Completed”?**

Entering an end date is **optional**.

# Contact Technical Support

**For further assistance write to:**

**Email:** [infoftcert@fairtradeusa.org](mailto:infoftcert@fairtradeusa.org)

