Hands & Feet	Title:	Project Guidelines		Rev. Status	Final
	Category:	Policy – Guideline		Rev. No.	1.0
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CONTENTS:

1.   What is an HFI Project? - Definition

Hands and Feet International recognizes that an integral part of facilitating its service delivery Partners with professional business/technical volunteers will be the need from time to time to help assist and sometimes lead with the provision of project-based endeavors that come forward or arise out of the Volunteer / Partner relationship. And that through the course of these ongoing relationships a specific need comes forward for something tangible to be built, sourced, or otherwise implemented in order to further the mission of the Partner delivery agency enhancing its effectiveness and reach to provide for the needs of its benefactors. Once there is clear alignment between the Partner's expected outcomes from the project and HFI's Purposes, the Partner or the HFI Volunteer can bring forward a Project Application for further consideration.

Once a project application is received, reviewed, and sanctioned, HFI facilitates a Canadian-based fund raising channel and project oversight services through agency agreements that assist the Partner in implementing the project and ensuring the planned outcomes and benefits are realized through diligent monitoring and evaluation throughout the project lifecycle.

A "Project" in HFI's terms means something ***tangible*** gets created and becomes an integral part of the Partner's assets and delivery processes; and that what gets implemented through an HFI Project is directly linked to increasing the effectiveness and impact of the Partner's services so that more benefits can flow to the people in need that they serve.

2.   How we Add Value to our Partners and Volunteers through Projects:

In a similar way to the HFI Service Opportunity fulfillment process that matches volunteer professionals with Partner delivery organizations, bringing our expertise, diligence and passion for excellence throughout the entire Posting lifecycle from application through to capturing the outcomes on our Story Wall, HFI Hands and Feet International means ***experience that builds trust and successful outcomes*** for Partners and Volunteers who are wanting to explore the

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possibility of a Project that will create lasting value and greatly help improve the lives of the people in the communities they serve. HFI's value-added in this joint pursuit are as follows:

To the Partner we bring:

- Project Feasibility and Project Lifecycle Experience
  - o Applied experience in vetting requirements, project task structure and dependencies
  - o Fine tune time, budget and other resource estimates
  - o Help plan out Definition, Design, Build, Commission, and Closeout phases
  - o Help assess potential risks and plan mitigations
- Benefits Alignment
  - o Ensure the tangible asset(s) created have direct linkages to targeted improvements in delivery processes, multiplication and scale up of benefits to program recipients
  - o Ensure faith-based values are integrated into outcomes
- Outcomes Assurance and Accountability
  - o Funding release management by phase
  - o Change management procedures and controls
  - o Closeout and evaluation, lessons learned
  - o Monitoring, Evaluation and reporting during all phases
- Project Implementation Oversight
  - o A dedicated HFI Project Coordinator and on-site Agent (see role descriptions below) assigned to every Project
  - o project tracking to plans, escalation or course correction as required
- Fund raising channel
  - o Includes receipt-able donations for all sanctioned project costs with a qualified donee delivery Partner

To the Volunteer we bring:

- The ability to fulfill a perceived need with the Partner over and above their service posting assignment and a structured approach to practically fulfil that need with tangible help and assistance.
- The opportunity to play an additional role of HFI Project Agent and oversee all or a portion of the project delivery lifecycle and assist in the raising of funds for the project.

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3. **Project Funding Application "pre-screening" Checklist:**

Partners or Volunteers looking to bring an application forward for project funding should first check if the proposed project will check these boxes?

- ☐ Requesting Partner is operating under an approved HFI MOU, or requesting Volunteer is currently fulfilling or has previously fulfilled an approved HFI Posting assignment with the Partner receiving the tangible property created by the proposed Project?
- ☐ Tangible Asset created will become part of the Partner delivery organization's balance sheet?
- ☐ Clear line of sight between all Project Outcomes and areas of service delivery covered by the Partner's registered non-profit status within their country of operations?
- ☐ Clear line of sight between one or more of HFI's statements of Purpose and one or more proposed Project Outcomes?
- ☐ Partner's capacity to receive, track and dispense project funding tranches by project phase?
- ☐ Willingness and capacity to comply with all HFI monitoring and evaluation requirements?
- ☐ Timeframes, budgets, and resource plans are realistic and achievable given the nature of the logistics, funds to be raised, tangible property to be created/built/sourced?
- ☐ Willing to fund raise to cover sanctioned project implementation costs?

If you can say "yes" to all the above statements, then we encourage you to fill in the Project Funding Application Form on our website for further review and assessment by one of our Project Coordinators and our Project Review Committee.

Note: HFI reserves the right to accept or decline any application for project funding and oversight according to its current priorities and mandates. All decisions of HFI are final. The applicant will be kept informed appropriately and in a timely manner throughout the application assessment and review process.

4. **Project Lifecycle Process:**

a. Partner identifies new project related to their mandate and service opportunities offered; or Volunteer identifies new project related to their current or past posting with Partner
b. Project outcomes reviewed for alignment with Partnership and HFI Mandates, Policies (PC, OC)
c. HFI accepts project request from Partner (PC)
d. Project Plan (including milestones, resources and tasks structure for Definition, Design, Build, Commission, and Closeout phases), Outcomes and Budget Drafted (PC, Partner)
e. Project Implementation Agent identified (PC, Partner, Volunteer)
f. Approval of Plan, Milestones, Outcomes, Funding and Implementation Agent (PC, PRC)
g. Project Agency Agreement signed (PC, Partner, Agent)
h. Project Funding Account Sanctioned (PC)

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i.   Raise Funding for Project (Partner, Volunteer)
j.   Funding released per planning Milestones to Agent for Implementation (PC)
k.   Project progress update reporting through all project phases (PC, Agent)
l.   Project outcomes Monitoring and Evaluation through all project phases (PC, Agent)
m.   Project Closedown and Lessons Learned (PC, Agent)
n.   Project Lessons Learned Application (PC, PRC)

Notes: PC = Project Coordinator; PRC = Project Review Council; OC = Opportunity/Partner Coordinator

5.   **Project Coordinator and Agent Roles**

These role descriptions listed here provide insight into the roles, responsibilities and general expectations of the two key roles of any HFI project and serve to help set in advance an understanding for the Partner, Volunteer and Agent how HFI projects will be overseen.

Project Coordinator

- Preliminary vetting of all project funding applications
- Develops/refines a project budget in collaboration with applicant
- Chairs the Project Review Council
- Notifies applicants of PRC outcomes related to their project
- Opens a project fund account for all sanctioned projects
- Creates an Agency Agreement between the Partner, Agent and HFI parties
- Stewards all project fund account inflows and outflows (bank accounts, tracking and balance updates, requisitions and disbursements, etc.)
- Receives all project progress reports submitted by Agent; handles any follow-up or escalation thereto
- Monitors and Evaluates project progress and actual outcomes against approved outcomes and milestones.
- Manages all feedback per project tracking to plans, escalation or course correction as required.
- Receives project closeout reports submitted by Agent, ensure project lessons learned are captured, and updates the PRC with summary of outcomes. Presents lessons learned to PRC.
- Obtains final sign-off from Partner, PRC and closes out Project including funding account.
- Publishes project outcome successes to HFI Story Wall

Project Agent

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- The person who agrees to act and is appointed on behalf of Hands and Feet International on all authorized matters as they pertain to and for the purposes of implementing an HFI sanctioned Project

- Uses their best efforts to faithfully represent HFI and to conduct all Project activity in a manner in keeping with the highest standards, principles and the expectations pertaining to an agent of HFI.

- Expend funds only in accordance with the direction of HFI

- Does not obligate HFI to any matter or thing without the authorization and direction of HFI

- Keeps accurate accounts and records of all funds received from HFI and disburses them on its behalf in the form prescribed by HFI

- Only spends up to a maximum of the budgeted amount for any Project budget line item. Should more funds be required to complete the Project, the Agent first submits an explanation and a revised budget prior to the overspending for approval from the Project Coordinator. When less funds are required to complete the Project, understands and supports that HFI is not obligated to disburse the unspent budgeted amount.

- Oversees the timely production and communication of all progress and other monitoring and evaluation reports as prescribed by the HFI policies and Project Implementation processes. These include progress update narratives at the completion of all phases of the Project, financial performance of actual compared to budget, the tracking of outcomes and milestones, and all required submissions at project closeout. The Agent understands that further funding tranches for the next phases of the Project will not be released until all reports and information have been submitted for the current phase and reviewed and signed off by the Project Coordinator.

Note: There may be specific circumstances that support and warrant the HFI Agent and the Posted HFI Volunteer to be the same person.

6. **Frequently Asked Questions (FAQ)**

   a. Project funding Minimum and Maximum values?
      i. HFI will consider applications for projects that have a minimum implementation cost of $1,000 CAD. There is no maximum amount for any Project funding application.
   b. Timing of Application process?
      i. Depending on the complexity and size of the Project application, the review and approval process may take from a minimum of 2 – 6 weeks.
   c. Are there specific inclusions or exclusions categories of which Projects will be considered or denied by HFI:
      i. Please ensure that ALL the requirements of the pre-assessment checklist are met before submitting your application.
      ii. HFI projects must include the creation of a tangible asset or other intellectual

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property. The ownership and ongoing maintenance costs of such asset must rest and be accepted by the receiving Partner.

iii.   No application for Project funding will be considered if the receiving organization is not an approved Partner of HFI and operating under an active Partnership MOU.

7.   **Reference documents (links):**

- Project Review Committee - Project Funding Approval Script for New Project
- Project Planning Milestones Template
- Project Budget Template
- Project Outcomes Template
- Project Agency Agreement Template
- Project Performance Report Template
- Project Closeout Report Template
- Project Delivery Lessons Learned Template
- Story Wall - Project Delivery Summary Template
- Project Application Form (Partner or Volunteer)