Date of this Closeout Report (YYMMDD): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Report completed and submitted by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The information in this report has been reviewed and approved by:

Project Agent: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Coordinator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Information Summary

Project ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Short Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Actual Start Date (YYMMDD): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Actual Finish Date (YYMMDD): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total Project Cost ($ CAD): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Receiving Partner

Partner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Partner ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Operating City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Operating Country: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phase-by-Phase Summary of Key Performance Indicators (KPI’s):

|  |  |  |
| --- | --- | --- |
| Definition Phase |  |  |
|  | Phase Planned Start Date |  |
|  | Phase Actual Start Date |  |
|  | Phase Planned Finish Date |  |
|  | Phase Actual Finish Date |  |
|  | Phase Planned Cost |  |
|  | Phase Actual Cost |  |
| Design Phase |  |  |
|  | Phase Planned Start Date |  |
|  | Phase Actual Start Date |  |
|  | Phase Planned Finish Date |  |
|  | Phase Actual Finish Date |  |
|  | Phase Planned Cost |  |
|  | Phase Actual Cost |  |
| Build 1 Phase |  |  |
|  | Phase Planned Start Date |  |
|  | Phase Actual Start Date |  |
|  | Phase Planned Finish Date |  |
|  | Phase Actual Finish Date |  |
|  | Phase Planned Cost |  |
|  | Phase Actual Cost |  |
| Build 2 Phase |  |  |
|  | Phase Planned Start Date |  |
|  | Phase Actual Start Date |  |
|  | Phase Planned Finish Date |  |
|  | Phase Actual Finish Date |  |
|  | Phase Planned Cost |  |
|  | Phase Actual Cost |  |
| Build 3 Phase |  |  |
|  | Phase Planned Start Date |  |
|  | Phase Actual Start Date |  |
|  | Phase Planned Finish Date |  |
|  | Phase Actual Finish Date |  |
|  | Phase Planned Cost |  |
|  | Phase Actual Cost |  |
| Commission Phase | |  |
|  | Phase Planned Start Date |  |
|  | Phase Actual Start Date |  |
|  | Phase Planned Finish Date |  |
|  | Phase Actual Finish Date |  |
|  | Phase Planned Cost |  |
|  | Phase Actual Cost |  |
| Closeout Phase |  |  |
|  | Phase Planned Start Date |  |
|  | Phase Actual Start Date |  |
|  | Phase Planned Finish Date |  |
|  | Phase Actual Finish Date |  |
|  | Phase Planned Cost |  |
|  | Phase Actual Cost |  |

1. **Project Objective:** *Describe an overall final summary of how the project achieved its planned objectives by closeout?*

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1. **Project Strategy:** *How closely was the project strategy followed, were there any material deviations from the planned approach and if yes, why?*

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1. **Financial Performance:***Quantify the funds that were expended vs. planned for each of the major cost categories within the approved project budget. State reasons why for any deviations greater/less than 5% variation vs. the approved budget by category. State what funds, if any remain unused at the conclusion of the project and how these funds will be returned to the project account allocated to the project – if the funds were already released and transferred to the local bank account where the project was being implemented.*

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1. **Work Activities – Quality Assessment:**
   * *From an overall quality perspective, summarize how key deliverables were accomplished throughout all phases of the project, noting any material deviations above or below the expected standard and how those deviations positively or negatively impacted project Outcomes?*
   * *Summarize the performance of key personnel performing activities on the project?*
   * *Summarize the performance of other key, non-personnel resources that were consumed throughout the lifecycle of the project and how they contributed to the project’s overall success?*

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1. **Ongoing Risks:***Describe any risks that have a high probability of impacting ongoing longer-term outcomes, maintenance costs or support services associated with the project? If such risks remain, quantify their impact per the above as much as possible and provide your best recommendation as to ways to mitigate their impact for stakeholders within the receiving Partner organization or the community of benefactors impacted by this project?*

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1. **Asset Transfer and Ongoing Maintenance:** *Has the tangible asset created by the Project been handed over to the receiving Partner organization, including title, deed or any other formalization of ownership? Is there evidence that the asset has been valued in its “as-delivered state” and entered onto the organization’s balance sheet? Is there evidence that the receiving Partner understands, accepts and has a plan for how to maintain the asset in good working order so that it continues to deliver the total benefits over its intended useful life?*

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1. **Outcomes - Beneficiaries:** *Summarize how each category of beneficiaries originally named in the approved Project application, have been directly impacted by the implementation of the project. Impact statements should include:*

* *what specifically improved, how many persons in this category did it improve for, whether this improvement was immediate and observable or whether it is anticipated based on an observed directional change in some measure taken as a baseline before the project*

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1. **Outcomes – Receiving Partner:** *Summarize how the Partner has benefited by the implementation of the project. State specifically what changed vs. the baseline at the start of the project, what data was used or other observations to determine the noted improvements, namely:*
   1. **Process Efficiency improvements:**

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* 1. **Delivery Effectiveness improvements:**

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* 1. **Organizational Capacity improvements:**

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* 1. **Other intangible improvements:**

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1. **Final Photos:***Provide file links for up to three photos that provide images to help convey how the project was finally delivered and handed over to the receiving Partner. These photos, once approved will be displayed along with the project narrative on the Project Story Wall page of the HFI website.*

Final Delivery Photo 1: *Link ID*

* Photo 2 (optional): *Link ID*
* Photo 3 (optional): *Link ID*

1. **Lessons Learned Capture**

**A Lessons Learned meeting for the project has been held and all findings captured on the   
 Project Lessons Learned reporting template.**

**Date:** *Date*

1. **Acceptance and Approval by Project Review Council  
     
    PRC has reviewed and approves this report as final for publishing within HFI.**

**Date:** *Date*