

**Post Project Evaluation Pro Forma for Professional Services**

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| **Project Title:** |  | | |
|  |  | | |
| **Name of Provider:** |  | | |
|  |  |  |  |
| **Prepared By:** |  | Date: |  |
|  |  |  |  |
| **Approved By:** |  | Date: |  |

**Section 1: Background**

Provide a brief description of the assignment including:

* What was the purpose of the assignment?
* What was the need for the assignment?
* Who was the appointed provider and when were they appointed?
* Information on start and completion dates.

| **Background** |
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**Section 2: Assessment of Costs**

This section should provide a comparison of the actual costs of the service with the agreed contract value.

Where the variation between approved and actual costs is greater than 10%, an explanation for the variation must be provided. Note if DoF approval was sought for the expenditure, they must be informed if actual costs exceed approved costs by more than 10%.

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| --- | --- |
| **Approved Cost:** | £ |
|  |  |
| **Contract Award Cost:** | £ |
|  |  |
| **Actual Cost:** | £ |
|  |  |
| **Variation between** | % |
| **expected cost and**  **actual cost** |  |

| **Explanation of variation in costs if greater than 10%** |
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**Section 3: Assessment of Deliverables**

This section should provide detail on what was delivered by the external provider. The extent to which projected deliverables, as outlined in the Terms of Reference, were met should be assessed.

| **Deliverables[[1]](#footnote-1)** | | **Extent Achieved**  **(see key)** | | **Explanation** | |
| --- | --- | --- | --- | --- | --- |
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| **KEY** | **✓✓**- Fully Achieved | | **✓ -** Partially Achieved | | **🗶 -** Not Achieved |

**Section 4: Assessment of Benefits**

This section should provide detail on the benefits of the assignment. For example:

* Did the benefits identified in the business case accrue as planned?
* Were the deliverables achieved within the timescale specified in the terms of reference? Reasons for any delays and the impact on expected benefits should be explained.
* Was the assignment used for the purpose originally intended?
* How were the outputs delivered by the assignment used?

| **Assessment of Benefits** |
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**Section 5: Division of Work**

This section should provide details of the division of work between in-house staff and the external provider. This should include information on whether the in-house assistance provided matched what was in the business case.

| **Division of Work** |
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**Section 6: Skills Transfer**

This section should provide an assessment of skills transfer. For example:

* What mechanisms were put in place to allow the transfer of skills and knowledge to happen?
  + Assess the extent to which transfer of skill and knowledge to in-house staff has taken place and what impact has this had on in-house capability?
* Has the need for future external support diminished as a result of skills transfer?

| **Skills Transfer** |
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**Section 7: Assessment of Project Management Arrangements**

This section should provide an assessment of the project management arrangements. For example:

* Were the monitoring arrangements put in place satisfactory?
* Was there an opportunity to influence performance interim stages?
* Was the project managed effectively?
* Is there anything that could be done differently in future?

| **Project Management** |
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**Section 8: Risks**

This section should be used to comment on the risks identified in the business case, if these occurred and how well they were mitigated. Also, are there any other unforeseen risks to consider in future?

| **Project Management** |
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**Section 9: Conclusions and Recommendations**

**Conclusions**

Provide a summary of what value was added by this assignment and assess whether, on balance, value for money was achieved.

| **Conclusions** |
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**Recommendations**

Provide a summary of the lessons learnt and provide details on how these will be disseminated.

| **Recommendations** |
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| *For more information see* [*Better Business Cases NI*](https://www.finance-ni.gov.uk/articles/better-business-cases-ni)  *Departmental economists should be able to provide advice on specific evaluation queries.*  *Any questions or comments about this pro forma should be sent to DoF at the email address below.*  [*economicappraisal@finance-ni.gov.uk*](mailto:economicappraisal@finance-ni.gov.uk) |

1. As specified in the business case and/or terms of reference [↑](#footnote-ref-1)