TRANSITION PLAN TEMPLATE

This template is for practitioners across the humanitarian, development and peacebuilding sectors. It was developed as part of the Stopping As Success: Locally Led Transitions in Development (SAS+) activity, implemented by a consortium consisting of CDA Collaborative Learning Projects, Peace Direct, and Search for Common Ground, with support and funding from the United States Agency for International Development (USAID). SAS+ learned alongside partners in transitions to local leadership and ownership from 2021-2025, and builds off learning from the original Stopping As Success project from 2017-2020.

OVERVIEW

Transition plans serve as key documents for organizations, teams, and other actors carrying out activities to ensure a responsible transition.[1] Transition plans identify key steps transitioning entities will take to ensure their process is responsible, sustainable, and mutually-beneficial for all partners involved.

The Transition Plan Template should be adapted based on the needs of those using it. The outline below covers the purpose of the transition, background on the organizations'/teams' vision for a successful transition with priorities and activities necessary to meet that vision, as well as a section on learning and adaptation.

TEMPLATE

A. PURPOSE
In this section, include:
1. Why a transition is important to the organization or team's values and shared vision.
2. How the team is approaching and will use this resource.

B. BACKGROUND
In this section, include:
1. An overview of the transition process and partners involved in the process.
2. Anticipated timeline of the transition (when the transition will officially take place, what that shift in leadership or ownership will involve, etc.).
3. An overview of what has been done to date to contribute to the transition.

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[1] Responsible transition refers to a jointly led, planned, and gradual process of transfer of technical and procedural ownership from an international to local level, while maintaining some form of relationship. Responsible transitions can happen at an organizational, programmatic, or activity level. Responsible transitions focus on achieving a shared vision of transition that sets up proximate actors to sustain and grow their impact.

C. TRANSITION PLAN

In this section, include:

1. The shared vision for a successful transition, which is determined through articulation of the goals of the transition and how each entity involved will contribute to those goals.
2. Priorities for a successful transition, which can include:
   - Roles and responsibilities of each partner, factoring in how those roles may change. Identify transition champions within each partner entity who will focus on implementing and adapting, as necessary, this transition plan. Capture the implications the transition process may have on other planned program activities.
   - Communication norms, such as the frequency of touchpoints beyond day-to-day program implementation (i.e. pause and reflect moments, progress reports, capacity assessments, etc.), as well as the primary modes of communication (in-person, email, or messaging platforms like WhatsApp, video calls, etc.).
   - Opportunities for mutual capacity strengthening, including how all partners in the transition can strengthen their skills, knowledge, experience, and networks.
   - Transition champions outside of the implementing partners, such as donor connections, community members, local government, and other relevant stakeholders involved either in the transition or the work that the local entity will take on post-transition.
3. Key activities to ensure a successful transition with target dates and leads identified (see the tables below to support this detailed planning). This process is meant to align with the programmatic work plan and transition plan.

In the priority tables below, seek to be as detailed as possible, including by identifying the people and organization(s) that are leading and supporting activities. Level of effort can be captured as "low," "medium," or "high," or can include estimated number of hours or days. This supports planning the necessary resources (including staff time) of the lead and support by the estimated completion date.

PRIORITY #1: TITLE

Provide a brief overview of why this priority is included and how it will contribute to a successful transition.

Activities	Lead	Support	Level of effort	Estimated completion date

PRIORITY #2: TITLE

Provide a brief overview of why this priority is included and how it will contribute to a successful transition.

Activities	Lead	Support	Level of effort	Estimated completion date

D. LEARNING AND ADAPTING THE TRANSITION PLAN

In this section, include:

1. How the team will pause, reflect, and adapt the transition plan based on learning between now and the anticipated transition date. Depending on the continued partnership after the transition has taken place, use this section to detail how you will measure the long-term impact of the transition.
2. To best support adaptive learning, SAS+ recommends that reflection includes discussion of outcomes at a programmatic level (e.g. implementation of key activities with corresponding data collection), as well as at a partnership level (e.g. communication and collaboration across organizations involved in the transition, how roles have or may need to shift to accomplish a responsible transition, discussions of power dynamics, etc.).