

Exiting / transitioning from international partnerships

A toolkit for small NGOs



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About the author

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[Here you can access all of the toolkits](#) including more accessible mobile-friendly versions



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Section 01: Introduction

1.1 What is this toolkit about?

This toolkit is designed to help small INGOs plan for and undertake exits and transitions from international partnerships with national civil society partners based in other countries. It includes resources for times when exits or transitions have been planned, and also for when there has been a crisis or change in strategy, and you need to exit or transition quickly.

It assumes that your INGO is already working with national civil society partners, and doesn't cover how to approach the transition from being an operational INGO to working in partnership (e.g. following training and sponsorship to strengthen local capacity).

1.2 Who is it intended for?

This toolkit has been designed for small (0-3 staff), UK-based international development charities that are working in partnership with national civil society partners based in other countries. Other small not-for-profits with international partners may also benefit from these insights.

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1.3 How and for what should it be used?

We don't expect you to use the tools exactly as they appear here, but to adapt them depending on your context and ways of working, and on the type of partnerships you support. The key will be to use them in a way that's appropriate and proportionate to your situation. Please feel free to adapt and innovate with them, together with your partners!

We recommend that you use this toolkit alongside your regular partnership and programme cycle management work. Many of the tools can be integrated into the different stages of a partnership and programme management cycle, to facilitate more responsible exits and transitions.

Definitions used in this toolkit:

Exit

Typically, the withdrawal of financial and technical resources for a specific project, programme or partnership, but it can also refer to exits where funds aren't involved e.g. ceasing joint advocacy activities together.

Transition

A shift in ways of working with a partner. Examples include: shifting from partners as project 'implementers' to 'technical support providers' or 'network members'; creating a new independent 'spin off' entity with partners or an INGO localising its office.

Section 02: Before the exit / transition

2.1. Design exit/transition into new partnerships from the start

One of the most common exit challenges for INGOs, is when they have had very long-standing partnerships with national civil society partners. These partnerships may have lasted for decades, and the original rationale for the partnership might have been forgotten a long-time ago. But there's a sense of loyalty to keep the partnership going, and talking about exit has become a 'taboo' topic.



So there are several things that you can do at the start of any new partnership, to help to set it up for success. These are captured in this checklist for new partnerships, and key points that relate to exit/transition are:

- Avoid creating dependency
- Be transparent
- Remember to schedule regular 'partnership reviews' from the start
- Design for sustainability from the start of new programmes/projects.

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2.1 Design exit/transition into new partnerships from the start

2.1.1 Avoid creating dependency

2.1.2 Be transparent

2.1.3 Schedule regular reviews

2.1.4 Design for sustainability

2.2 Making a decision to exit

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2.1.1 Avoid creating dependency

Over-dependency on INGO inputs results in unhealthy partnerships & means long-term initiatives are likely to fail. Make sure that the type and scale of delivery and levels of funding involved wouldn't overwhelm your partners, and that you engage with and support local power structures that hold legitimacy, power and agency at community-level for maximum chances of success.

2.1.2. Be transparent

Transparency helps to create trust. You can help to create healthy partnerships from the start by developing a simple Partnership Strategy or Policy, to share with your partners. This explains how you work with partners, your 'partnership principles' if you have them e.g. 'equity', 'transparency', and what the partner onboarding process is (e.g. if a due diligence process is involved) plus what they can expect from you (e.g. equivalent organisational information, partnership reviews). It should also signal how long you will typically work with partners for, and how decisions to exit or transition will be made.

Make sure you also discuss how long you and the partners anticipate being in a partnership for early on, and what 'type' of partnership you believe this to be from the start. These things can change over time, but being clear from the start will create a solid foundation for open dialogue with partners and ensure you all see things in the same way. Is the partnership reliant on access to funding, or is it bigger than that?

Example: Carers Worldwide

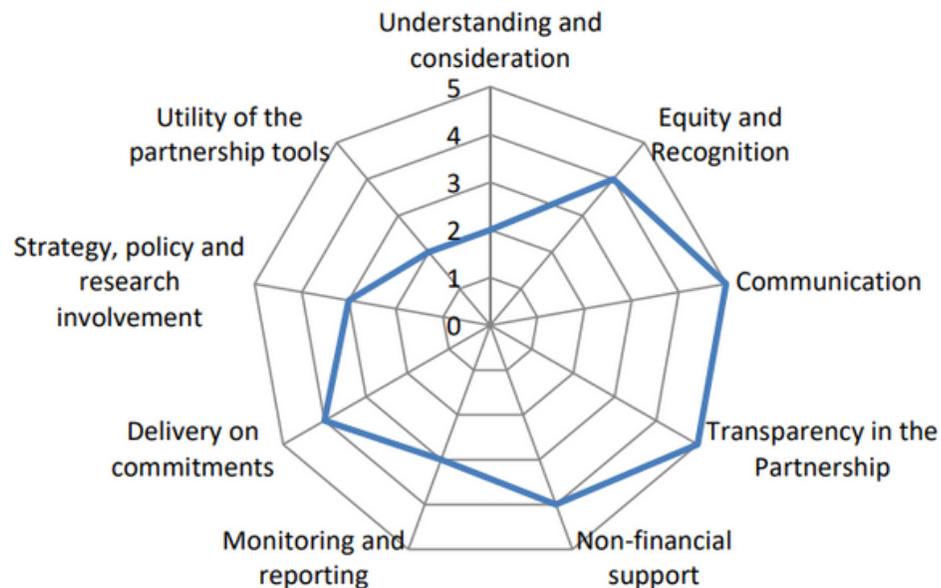
Carers Worldwide works with partners in India, Nepal and Bangladesh. From day 1 of their partnerships, they were open about their strategy to work with local organisations as 'implementing partners' for a maximum of 7 years, before graduating to becoming 'resource network members'. This will involve new, paid responsibilities e.g. providing training and support for new implementing partners.



2.1.3 Remember to schedule moments for regular ‘partnership reviews’ from the start

This is when you can discuss and review how the collaboration is going as well as the projects themselves. Remember to share organisational updates, review what’s going well (including how you’re working together), address any partnership challenges and identify actions that will help your partnership to be more effective in the future.

It’s also a chance to talk about the future of the partnership, to ensure that you’re on the same page and there are no surprises.



You can find [an example of a ‘partnership review’ process and template](#) which was used by a former INGO called EveryChild.



A guide to partnership reviews developed by the World Wildlife Foundation (WWF) is [available here](#).

2.1.4 Design for sustainability from the start of new programmes/projects

At the start of a new programme/project, it's important to consciously incorporate questions about sustainability into your needs assessment & project design, as well as your monitoring frameworks. This involves:

Talking honestly about sustainability.

Think about which activities you expect to stop at the end of the project, and which need to continue to have a lasting impact and to avoid doing harm. For sustainability planning to be effective, the same stakeholders who are often already overstretched and under-resourced would need to have sufficient capacity take on any additional responsibilities that would continue after the project ends - ideally during a gradual transition period. This requires the active buy-in and consent of the stakeholders regarding any responsibilities they are expected to take on at the end of the project from the start.

Planning for a tapered exit from the start.

If the plan is initially for INGO staff to deliver any technical activities which would later be delivered by partner staff, ensure you build in a transition period. This means agreeing when INGO staff will shift from 'leading' to 'supporting' and how this will be done e.g. through mentoring, shadowing etc. It can also be helpful to plan for a transition period for up to a year after the end of the programme, to provide ongoing technical backstopping and mentoring e.g. in programme management and advocacy. This has the potential to enable former partners to continue to grow their capacity and confidence post-exit.

Capturing key agreements in a Partnership Agreement / MOU.

This should lay out your overall partnership aims and preferred ways of working, partnership principles, governance arrangements etc. It can be open-ended or time bound, and serves a different purpose to your individual project/grant agreements.

Section 03: Making a decision to exit / transition

How can you decide when to exit / transition from a partnership? There are usually 3 main reasons:

Stopping as success:

You and your partners have done what you set out to do, and there's no longer a need for continued collaboration.

No longer viable/ effective:

The partnership is no longer viable or effective: This can be for internal and external reasons e.g. you can't resolve your differences, there's been an integrity crisis, the context has changed so much that the original rationale for the partnership is no longer valid, or the added value of working in partnership isn't being realised.

Change in strategy:

You or your partners have a new strategy or approach e.g. your partners might be ready to take on more responsibility or your organisation may want to focus on an alternative thematic area/region.

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3.1 Making a decision to exit / transition

3.1.1 Elements to consider when making a decision

3.1.2 How to approach the initial conversation with partners?



Read more on [Stopping as Success](#)



[Here's a link to these exit / transition criteria](#) with some additional guidance to help you and your partners decide if it's time to exit / transition.

3.1.1 Elements to consider when making a decision

Talk with your staff and partners about why and how the exit / transition will take place. For example:

- What do your organisational values e.g. 'transparency' mean in practice for any transition process?
- Is it exit or transition? Which is the preferred option and why?
- Would it help to identify specific 'exit or transition principles' that will guide the process? For instance, these are the "Responsible Exit Principles" identified by former NGO "Everychild":
 - As far as possible, ensure that the work we have done is sustainable – this could be continuation of services or lasting changes in children's lives.
 - Ensure that exit does not have a detrimental effect on children and communities where we work.
 - As far as possible, ensure that expertise and momentum for change in country is not lost.
- What's a realistic timeframe for the exit or transition? 2 years notice minimum is ideal, so partners can plan for alternative funding sources, but timings may be shorter/longer depending on the nature of your relationship and how dependent the partners are.
- How will you track progress towards the exit or transition and your respective responsibilities? See sample exit indicator tracking sheet
- How will you manage the risks associated with exit or transition e.g. for service-users?
- How can you help partners to communicate their success stories?



Another example of exit principles is the ones [used by American Red Cross](#).



Praxis Note #70 has further context on [Every child's responsible exit principles](#)



Here you can find a blog about [why principles are necessary during exit](#)



[A sample indicator tracking sheet is available here.](#)

Document the evidence for your decision.

Partnerships rely on relationships which can be very personal. It's therefore extra important to collect evidence to justify your decision, which you can share with partners, staff, Board members etc. This can help to provide reassurance that the decision is not the result of a personal issue between individuals or a sudden whim, but has been thought through and is an organisational position rather than a personal one.

Invest in the exit or transition.

Agree if any additional investment can be provided to capacity strengthening support for leadership development, fundraising, etc. if required (and in line with your organisational strategy).

What NOT to do: "decision-based evidence making"

Sadly sometimes, organisations will make a decision to exit from a partner on a whim. Maybe there's been a personal conflict between the INGO Director and the partners' Director, or maybe the partner has become more vocal and critical about the INGO's ways of working and requirements which the INGO isn't ready to accept. Sometimes INGOs might ask partners to invest time in a partnership review, simply to gather 'evidence' for a decision that they've already made...

Good practice example: Oak Foundation

Oak Foundation provided a mix of leadership development, strategic planning, financial management and resource mobilisation support for their partners in Ethiopia as part of their exit plans.



More information about what Oak Foundation did as part of their exit plans is available in Ayele Ashagre's blog "[Investing in exit: funders with foresight](#)" from November 2021.

3.1.2 How to approach the initial exit / transition conversation with partners?

Any initial conversation about exit / transition is likely to be emotionally charged, especially if this is the first time that you'll be discussing it with partners.

So be sure to:

Approach respectfully and recognise its emotional dimensions

Conversations about exit / transition are emotive, and can be painful – especially in long-standing partnerships. Make sure you give partners and also your own colleagues the time and respect these conversations deserve, and acknowledge the feelings that come with them, including sadness, grief, anger, anxiety but also excitement and hope. These are all normal and to be expected. Try to have the conversation in person if possible.



Ensure there's clarity around 'why'

While staff and partners may not 'agree' with the decision to exit / transition, if the rationale is clear and communicated transparently, then it will help people to accept them.

Refer back to your exit / transition principles if you have them

This can help to provide some reassurance about 'how' the exit will take place.

Acknowledge power dynamics and aim to increase partner's sense of control, provide support and reduce uncertainty

Highlight how partners can meaningfully be involved in helping to design the exit / transition process – for example, feeding in to decisions about 'how' the exit will take place, any additional support their organisations may require during the transition period, and what support they can expect from you.

Ensure there's clarity about the process and what the next steps will be

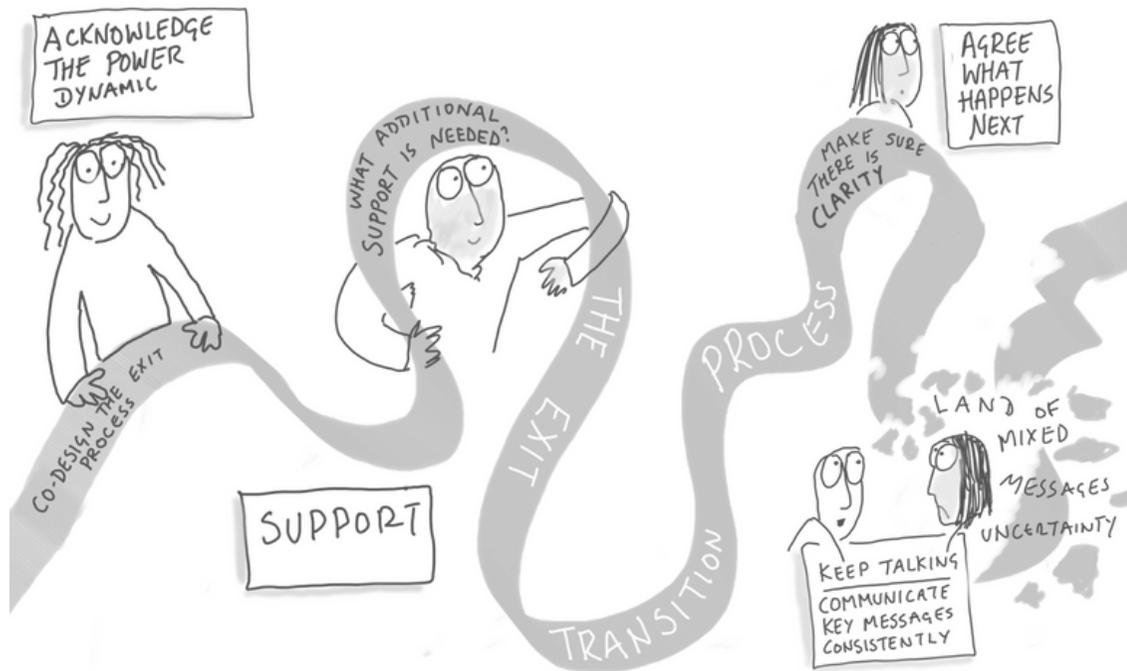
Agree what happens next, and also be honest about any issues where you may not have the answer yet, and when you expect the situation will be clearer.



One very simple framework that can help prevent or reduce associated stress is called CUSP™, which stands for 'Control' 'Uncertainty' 'Support' and 'Pressure'. This tool was developed by In Equilibrium, and you can read more about it [here](#)

Keep talking

Hopefully you're in regular dialogue with partners about the future of the partnership from the start. However, partners may still not believe you when you talk more concretely about exit / transition – particularly if there's been mixed messages about this topic in the past. It's important to continue communicating key messages about exit / transition regularly and consistently once a decision has been made.



Section 04: During the exit / transition

4.1 Partnership exit/ transition planning considerations

Once a decision has been taken and you are planning for an exit / transition, remember to consider the following elements:

- Governance e.g. any approvals needed from your Board
- Additional organisational development support to partners in the lead up to exit
- Programme activities & timelines (that promote sustainability)
- HR & how to help partners/staff remain motivated
- Finance e.g. final transfers & reconciliations etc.
- Donor & reporting requirements
- Communications (with communities, donors & staff)
- Risk management & how to manage any risks associated with the transition.



[An editable version of this checklist is available here.](#)

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4.1.3 Detailed transition plan

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4.1.1 Designing the exit / transition process

Significant exits (i.e. with long-term partners or multiple country exits) are also organisational change processes.

During an Action Learning Set on exit facilitated by INTRAC, we found that the following approaches are particularly important during an exit or transition:

Don't panic about principles.

These can be a valuable reference/guidance point but it is important not to get stressed if they have not been developed early on. Instead, use this as an opportunity to involve partners in the process and review what exists around exit, guidelines and values.

Think holistically about capacity strengthening, organisational development and sustainability.

It can be beneficial to frame exit as sustainability planning and consider this early on in the relationship. Sustainability should also be incorporated into ongoing capacity strengthening with partners, but make sure you find a balance between supporting and enabling partners to become independent.



This experience is documented on [INTRAC Praxis paper no. 31](#)

Recognise the value of investing in staff care

Do not underestimate the need to look after staff and volunteers within your and partner organisations who are implicated by exit or transition, and factor in additional resources for this.

Lead by example

Staff and trustees need to champion exit. This is essential in motivating others, and ensuring they are well-supported. Leaders also need to make the necessary resources available for embedding learning and building monitoring of, planning for, and learning about exits into mid-term and strategy reviews. This is crucial in order to avoid repeating mistakes.

Investment

It is important to recognise that a good exit or transition strategy might require investment, and allocate the necessary resources.



This blog by Rachel Hayman looks at "[The human side of the exit strategy. Staff care and personnel management](#)"



Here's another blog on [investing on capacity building for exit](#)

4.1.2 Programme activities

When you're working on the more detailed partnership exit plans, it can be useful to hold a workshop with partners, to unpack:

- Which activities/services will **continue in the same way** in future (including how much they cost, and how this will be funded)
- Which activities/services will **continue in a modified form** in future
- Which activities/services **could be handed over** to another organisation(s) in future (and identifying potential organisations to approach)
- Which activities/services will **no longer continue with external support** (either because they've become self-sustaining or because there's no capacity to continue them)



4.1.3 Detailed transition plan and timeline

You'll probably find it helpful to have a detailed transition plan and timeline, to help you keep track of key milestones and so you and your partners can regularly review your progress together along with your exit and transition indicators (see page 12).

You'll need to decide what information to share with your partners, and if you want to create an internal tracking sheet as some of the details e.g. who is responsible for internal tasks may be irrelevant for the partners.



You can find a template for an internal 'partner exit checklist' [here](#), which you can adapt for your own situation.



Here's a link to an "[Exit for sustainability checklist](#)" by *Valuing Voices*

4.1.4 Additional things to consider

If you're planning to localise an office rather than completely exit from a country, it's very important to consider the **rationale** for this, and **what added value this will provide** to civil society. There's may be a risk that you will take space and attention away from existing civil society organisations.



A useful tool when considering strategic questions such as these is a Strengths, Weaknesses, Opportunities and Threats exercise (SWOT). More information can be found in the Strategic Partnerships toolkit and there is an [example available from Mind Tools](#).

Assuming that you've carried out a proper review and decided to go ahead, then other important considerations when planning to localise are:

- **Business Planning:** the new organisation will need a proper Business Plan, that identifies their place in the market, how much turnover they would require, likely sources etc.
- **Legal considerations:** It's important to factor in the need for legal advice from the country where you're working, to advise on local registration and governance arrangements, and local labour laws relating to redundancy if this seems likely.

4.2 The exit itself

- Have a call/visit with the partner to mark the exit and celebrate all that you've achieved together.
- Send a formal letter to confirm the partnership has now come to an end, and close your MOU or partnership agreement if you have one.
- Provide a reference letter for the partner, for future reference
- Check all of the final tasks are complete



[Sample agenda for the final call](#)



[Sample end of partnership letter](#)

4.2.1 What happens if you need to exit in a hurry?

If you're exiting in a hurry because of integrity issues, because a due diligence process has thrown up concerns or because things have gone wrong...

Keep lines of communication open

Even if things have gone wrong and you need to exit quickly, it pays to keep the channels of communication open and to seek to understand the other organisation(s) perspectives.

Explain why and refer back to evidence for the decision

Being able to explain why you've decided to exit, and referring back to the evidence for the decision, will help the partners to understand even if they don't fully accept your decision.

Actively follow up on potential safeguarding issues

In a worst-case scenario where a partner has had to fold, check what's happening to any sensitive data e.g. are there any files with children's names still left in their office. Who is responsible for taking care of that, even if staff are no longer being paid? And how?

Keep your key stakeholders updated

Aim to keep all of your key stakeholders updated regularly e.g. Board members, any other local partners, community members if you have direct contact with them, and your funders. They will all want to understand what's happened, and why you are leaving. Some details may still be confidential, but share what you can to increase their trust in your organisation and the process.



Example: managing exit during organisational collapse

One of the Directors of a child-focused partner organisation was accused of financial malpractice by a former member of staff. The Board commissioned a forensic audit, but meanwhile INGO were unable to transfer payments until the results were released. Although the audit found no evidence of fraud, the organisation still collapsed as it had lost the confidence of its own staff as well as its donors.

Several INGOs kept the communication lines with the Board open and worked hard to understand the process and their perspective on the issues. They collaborated to ensure that children's details which were left in the abandoned office would be secured. One of these INGO was receiving project funds from the British Government, so kept their funding manager updated as well as their own management and Board. Although the organisation collapsed, risks were still managed and INGO funds were still accounted for by employing several former staff on a temporary consultancy basis.

Section 05: After the exit / transition

Ideally, there would be an element of ongoing contact/support as part of a phased exit or transition. Either way, it's good practice to schedule a follow-up call 6 months post-exit or transition, to find out how the partner is doing and adjust your exit or transition approach with other partners on the basis of their feedback.

Partners will appreciate it if you continue to champion their organisation with other funders, and share funding opportunities etc.

You may also find it helpful to commission an external review / evaluation of your exit or transition process several years later, to understand what impact it had and how sustainable your work with partners has been.



[Read this review commissioned 5 years after Every Child's responsible exit](#)



[Template for a follow up call](#)



"People will forget what you said, people will forget what you did, but people will never forget how you made them feel." (Maya Angelou)

This is especially true during an exit or transition process.

While the start of a new project or partnership is often an exciting time, and attracts lots of positivity and organisational energy, the ending of a project or partnership can be much less 'sexy'. However, it's often how you exit or transition from a partnership that can either create lasting change or seriously damage other organisations along with your own reputation.

Start well, but pay attention to the ending of a partnership too – it's how you exit or transition from your partnerships, that you'll be remembered most for.



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