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This tool is published by INTRAC in conjunction with the [Exiting and transitioning from partnerships toolkit for small charities](http://www.Intrac.org/ba-exit-toolkit)authored by Lucy Morris – part of a collection of [five toolkits](http://www.intrac.org/ba-toolkits) produced as part of the [*Strengthening Small Organisations with Big Ambitions*](https://www.intrac.org/projects/strengthening-small-organisations-with-big-ambitions/)programme (2021-2022). This programme was funded by the UK Foreign, Commonwealth & Development Office (FCDO) through a Small Charities Challenge Fund (SCCF) Capacity Development Grant

# **Tool – Exit /transition planning areas checklist**

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| **Background:** This checklist has been designed as a guide when starting to plan for a transition/exit from a partner. Please refer to the [**toolkit**](http://www.Intrac.org/ba-exit-toolkit) for further guidance. |

❑ Governance e.g. any approvals needed from your Board?

❑ Additional OD support to partners in the lead up to exit e.g. help with fundraising, networking, communications

❑ Programme activities & timelines & how to ensure work is sustainable e.g. when is the final project scheduled to end & allow time for final reporting, evaluations and audits if required.

❑ HR & how to help partners/staff remain motivated, particularly if their jobs will come to an end at the end of the partnership e.g. new opportunities to learn, financial bonus to remain until the end of the transition process

❑ Finance e.g. final transfers & reconciliations etc

❑ Donor & reporting requirements e.g. can existing contracts be transferred to the national partner? Any additional due diligence required?

❑ Communications (with communities, donors, supporters & staff)

❑ Risk management & how to manage any risks associated with the transition e.g. during a rapid exit, how to ensure sensitive data at community level is protected for example