TAACCCT Transition Planning Checklist

As Round 4 grantees come to the end of their project, staff transitions are inevitable. Grant funded project directors/managers, navigators, faculty, and support staff will find a new job leaving the project in the final months of the grant. In this transition period, ensuring the new(existing) staff are properly prepared will help continue the current momentum of the initiative as well as sustain innovations and promising practices after the grant has ended. This checklist will help you transition responsibilities to new staff to collect and report on data, sustain your efforts and innovations, and close-out your grant successfully.

Preparing for Transition

- Get started right away! Don’t wait until the project manager/director announces their departure.
- Bring in your existing staff to the conversation and transition planning efforts.
  - Communication, Communication, Communication
  - Make sure it becomes a topic of ongoing discussion at staff meetings
  - Meet with everyone at the college/in the consortium that has responsibility for implementation so they understand the hand-off process
  - Have the project manager report out on major activities
  - Diversify the work among several members of the staff to create redundancy
- Estimate the length of the transition period and overlap that ensures full handoff of responsibilities.
  - On average, a full transition period is a month at minimum.
- Transparency is key! Ensure that remaining staff are aware of any issues that concern the project.

Executing the Transition in the last 6 months

- Develop a plan for the major deliverables/activities in the last 6 months
  - Student completion, employment, and job placement tracking
  - QNPR, Fiscal, and APR Reporting
  - Upload products to SkillsCommons
  - Create a Workforce GPS account to receive performance reporting and SkillsCommons guidance webinars
- Identify key project staff and the longevity of their roles within the project.
- Ensure clear transfer of knowledge
  - Develop a timeline for the handoff
  - Even items that seem small could be invaluable to the new staff member
- Manage the expectations of a new staff member coming in to take a position that is not permanent.
  - With a temporary position, the applicant pool may have a short-term mindset, may leave abruptly, and may search for a full time job while on the job. These factors could impact the progress and performance of the initiative.
Meet with key partners and senior leadership at the college to ensure a formal introduction to new staff/project manager.

- This could be the most important part of the transition plan. External partners want to be assured that the college/grantee will keep the level of service/work with the new staff member. Any lack of confidence could be detrimental to the initiative.

Identify a staff person who is not funded by the grant who will have knowledge of the programmatic and fiscal nature of the initiative (even if you plan to hire temporary grant staff for close-out responsibilities) This could be a senior or junior staff member who would have complete knowledge of the entire project. Stem to stern.

Identify training needs of existing or potential new staff (for example cross-training.)

- If the current or new staff needs additional training, e.g. project management, software, specific skills for the job, identify opportunities for training or cross-train at the college during the overlap period, if possible.
- Consider any additional skill sets that would be beneficial to the next phase of the project, especially when sustainability planning is involved.
  - The skills set of the new staff may be different that the original skill set needed for the current project manager, e.g. startup and execution versus close out and sustainability.

**Other Things to Keep In Mind**

- **Logistical considerations**
  - Update new P.O.C. information with DOL and Federal Project Officer
  - Passwords/usernames for any project management or reporting systems
  - Transfer all data and information the previous manager has stored

- **Don’t supplant**
  - When moving the roles to a current staff member, don’t supplant their income without clearly re-doing their job description/role at the college. Supplanting is not allowable.

- **Identify necessary transition resources**
  - Manual of procedures/processes, e.g. navigator or career coaching guides, prior learning assessment toolkits, etc

**Compliance Guidance**

- An initial letter from your closeout specialist will arrive sometime in August
- The letter will be sent via email to:
  - Authorized Representative
  - SF 424 Point of Contact (listed on your SOW)
  - Your Main Point of Contact that your FPO has on file
- Please ensure ALL of these contacts are up to date by August 1, 2018
The SF 424 and Authorized Rep require Mods to update