**FORM D**

**TRANSITION PLAN TEMPLATE**

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| **INCUMBENT** | **ROLE EXIT DATE** | **SUCCESSOR** | **NEW ROLE START DATE** |
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| **INCUMBENT EXECUTIVE** | **PHONE/EMAIL** | **SUCCESSOR EXECUTIVE** | **PHONE/EMAIL** |
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| **INCUMBENT HPP POC** | **PHONE/EMAIL** | **SUCCESSOR HPP POC** | **PHONE/EMAIL** |
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| **INCUMBENT EMTF POC** | **PHONE/EMAIL** | **SUCCESSOR EMTF POC** | **PHONE/EMAIL** |
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**TRANSITION TEAM**

Identify key members of the transition team, detailing roles, responsibilities, and organizational involvement, i.e., public authority, incoming or outgoing contractor, etc.

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| **NAME AND TITLE** | **ROLE AND RESPONSIBILITIES** | **ORGANIZATION** |
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**TRANSITION TASKS, ACTIVITIES, AND SCHEDULE**

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| **ACTIVITY / TASK** | **START DATE** | **FINISH DATE** | **TO BE ACTIONED BY** |
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**RISKS**

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| **RISK** | **MITIGATION STRATEGY** |
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**COMMUNICATION PLAN**

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| **STAKEHOLDER** | **CONTACT INFORMATION** | **METHOD** | **FREQUENCY** | **PURPOSE** |
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**Stakeholder communication Tracker [ -------------for dshs use-------------]**

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| **Communication** | **Communication Date** | **Date Sent to DSHS** | **Attendance, Distribution List Received** | **Agenda, notes, and outcomes Received** |
| Notification of transfer |  |  |  |  |
| Transfer Update |  |  |  |  |
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| **ACTIVITY TYPE** | **HPP Liaison** |  |
| **Assessment and Planning** |  |  |
| **ACTIVITY DESCRIPTION** | **COMPLETION DATE** | **COMMENTS** |
| Outgoing HPP Assessment: Review the current contract, including all deliverables, milestones, performance metrics, and state assets to be transferred. |  |  |
| Incoming HPP Assessment: Evaluate the capabilities of the new partner to ensure they meet the deliverables, milestones, performance metrics and can store and maintain state assets. |  |  |
| Gap Analysis: Identify any potential gaps between the current and new partners' capabilities and develop mitigation strategies. |  |  |
| Risk Assessment: Identify risk during each phase of transitions and identify mitigation strategies. |  |  |
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| **ACTIVITY TYPE** |  |  |
| **Knowledge Transfer** |  |  |
| **ACTIVITY DESCRIPTION** | **COMPLETION DATE** | **COMMENTS** |
| A comprehensive document list transferred: Transfer all relevant documentation, including program plans, reports, protocols, ongoing projects, training, and historical data. |  |  |
| Materials, agendas, attendance of past and future meetings, trainings, workshops: Conduct knowledge transfer meetings and workshops to ensure the new HPP understands the program's operational and strategic aspects. |  |  |
| Training: Provide training sessions for the new HPP staff on specific systems, processes, and tools that will transfer and are needed for continued service to coalition members. |  |  |
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| **TRANSFER ACTIVITY** |  |  |
| **Operational Handover** |  |  |
| **ACTIVITY DESCRIPTION** | **COMPLETION DATE** | **COMMENTS** |
| Inventory Management: Transfer all physical and digital assets, including equipment, software licenses, and databases. Provide a list of all items |  |  |
| Access management: Update access credentials and permissions for all systems and platforms. Provide a list of all items. |  |  |
| Agreed date or phase for the assumption of core HPP and response functions: Ensure there are no interruptions in critical services during the transition period by overlapping certain operations if necessary. The transfer of staged assets should be done administratively. |  |  |
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| **TRANSFER ACTIVITY** |  |  |
| **Contractual & Legal Considerations** |  |  |
| **ACTIVITY DESCRIPTION** | **COMPLETION DATE** | **COMMENTS** |
| List of contracts revised or transferred: Review and revise regional contracts as necessary to reflect the change in partners. |  |  |
| Agreement for reconciliation: Address financial arrangements, including the transfer of funds and reconciliation of any outstanding invoices with the current partner. |  |  |
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| **TRANSFER ACTIVITY** |  |  |
| **Performance Monitoring and Reporting** |  |  |
| **ACTIVITY DESCRIPTION** | **COMPLETION DATE** | **COMMENTS** |
| Agreement on Gantt Chart or similar progress metric: |  |  |
| Agreement on issue resolution process |  |  |
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| **TRANSITION FINAL AGREEMENT** |  |
| All parties agree that the transitional activities have been completed and no further action is needed. | |
| **INCUMBENT SIGNATURE** | **DATE** |
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| **SUCCESSOR SIGNATURE** | **DATE** |
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| **CHEPR SIGNATURE** | **DATE** |
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