Insert name of project using orange text

**Business area:** Insert name using grey text

**Project sponsor:** Insert name using grey text

**Project contact:** Insert name using grey text (see instruction below in blue text - delete after reading)

**Version information:** Insert version information (number or date) using grey text

When identifying who to list as the project contact consider who may be most responsible for corresponding on behalf of the project team, or who may be responsible for managing project documents. Often the project manager or project leads will be appropriate contacts to list here.

**Please read and then delete ALL blue text.**

**Please replace ALL orange text.**

**What this tool is and how it can help your project team**

The project transition plan is a detailed document that guides the delivery of project outputs and services to the end users (operations) who will take responsibility for sustaining these in the business. The plan outlines what the project team and operations staff need to achieve prior to project closure. The document identifies specific actions, responsibilities and expectations for individuals and groups, along with key factors for success.

Project teams can use the transition plan to ensure a common understanding among the team and all impacted stakeholders regarding post-project responsibilities and activities that will become part of regular business. Teams can also use the plan to provide clarity on how the main project outputs (typically clinical content, tools, processes and data) will be owned and managed after the project.

**Advice for completing and using this tool**

**Who:** the project manager (or another project team member with a leading role in transition planning) enters and updates the information in the transition plan. Information is gathered from the project sponsor(s), team members, and stakeholders from the recipient business area. Involving decision-makers and key individuals from operations (the end users that will accept ongoing responsibility for project outputs and services) is critical. Project documents are another source of valuable information.

**When:** expectations for transition should be discussed early on in the project. This creates opportunities for intended end users to be involved during the project where needed. The documented transition plan itself tends to be prepared closer to the end of a project. Despite being one of the later outputs, a transition plan should still in place sufficiently before project closure so that transition activities are completed within project timelines and with project team support.

**How:** begin by reviewing all sections of the tool and the instructions provided; include content for those that apply for your project.

Aim to include enough detail to be clear and specific about the steps and responsibilities involved, so that all individuals and groups can deliver what is required.

Ensure the project sponsor and recipient business areas have reviewed the transition plan. Once the plan has been approved transition can proceed.

**Formatting tips:** Use the configured Styles in the editing ribbon above to achieve consistent formatting of headings and regular text throughout the document. If desired, authors can delete page breaks between sections for a more condensed document with minimal white space.

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**Revision History**

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| Version | Date | Author(s) | Revision notes |
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This project management template was created by Clinical Project Support Services - a team within the Provincial Clinical Excellence portfolio. Questions regarding this template can be sent to clinicalproject.supportservices@ahs.ca.

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(Update page numbers in table of contents after transition plan is completed and instruction page removed.)

# Current State

## Project Background

***Briefly*** describe relevant details of the project leading up to transition. Provide the project objective statement and general approach taken during previous stages of the project. Highlight deliverables and outputs that will be sustained in the business. Describe how implementation was carried out, and the outcomes to date. Including some information about the scope of stakeholders (individuals, disciplines, geographies, sites, etc.) involved may also provide valuable context for readers less familiar with the project.

Some of this information will already be captured in other project documents. However, such outputs may not be readily accessible to transition partners so there is value in providing a brief summary here for reference.

## Project Outcomes

Project outcomes that demonstrate value delivered to the business help inform decisions to proceed with transition. Include a high-level summary of key project outcomes and other findings following evaluation.

## Outstanding Project Issues and Activities

Identify all outstanding project issues and activities that will need to be addressed or monitored by the business area that is receiving project outputs. Include any outstanding issues and activities that are scheduled for completion prior to the end of transition. Consider both short-term (immediate) needs and long-term needs to support issues management post-transition. A recommended practice is to clearly list the items that require follow up in the next month, next 1-3 months, etc.

Note: Activities and responsibilities associated with **ongoing** issues management should be listed in Section 8.

## Lessons Learned for Sustainability

Briefly identify key lessons learned that are relevant to (or may impact) sustaining project outputs following transition. Highlight knowledge gained during implementation. This may include site relationships and local determinants of implementation success.

# Ownership of Project Outputs

## Ownership

Identify the individuals or groups that will assume ownership of project outputs following transition. Such outputs may include documented processes, content, tools, forms, among others. Consider which outputs or post-project ownership responsibilities are appropriate to reside at higher organizational levels versus those that should be owned locally. There will likely be multiple owners with distinct components and/or responsibilities.

## Storage and Access

Describe how project outputs will be stored and accessed following project transition. Such outputs may include documented processes, content, tools, forms, among others. Storage options may include, but are not limited to, internal/external websites, provincial print catalogues, electronic medical record platforms, and others.

Use the table below to describe all **activities** associated with the transfer, maintenance or oversight of the storage of project outputs (i.e. what needs to happen, when, how often). List the specific **individuals or groups responsible** for each activity. Identify individuals with decision-making authority if changes to storage/access become necessary. Consider potential costs associated with these activities and, if applicable, identify how those costs will be covered.

Table 1: Activities supporting storage and access of project outputs

|  |  |  |  |
| --- | --- | --- | --- |
| Description of activity | Timelines / frequency | Individual(s) or group(s) responsible | Costs and/or other considerations |
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## Content Review Cycles

Use the table below to describe the activities and processes that will be established to support post-project review and/or modification of content, such as revisions and updates. Consider both periodic and ongoing activities. Identify the individuals or groups responsible, and those that will need to be involved or consulted. Consider the following four broad areas related to content review:

* Processes for reviewing new literature and evidence
* Processes for requesting changes
* Processes for making changes
* Processes for communicating changes to end users.

Consider potential **costs** associated with content review and/or modification. For example, costs may be associated with remuneration for subject matter experts, graphic design work, forms revisions, website programming or updates, etc. For each cost, identify the **individuals or groups responsible** for those costs and the **funding source** that is planned.

Table 2: Activities supporting content review cycles

|  |  |  |  |
| --- | --- | --- | --- |
| Description of activity | Timelines / frequency | Individual(s) or group(s) responsible | Costs and/or other considerations |
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# Data Management

## Management

Identify the individuals or groups that will oversee the management of project data following transition. This includes:

* data derived through the initial evaluation of the project
* outcomes data generated on an ongoing basis beyond transition and closure of the project.

Consider whether there may be any intellectual property concerns that may need to be described in this section. Review any intellectual property requirements documented in the project management plan.

## Ongoing (post-project) Data Review

Describe **activities** associated with ongoing (i.e. post-project) review and analysis of outcomes data. Identify the individuals or groups **responsible** for those activities. Consider the frequency and scope of data review and describe any processes that should be followed during review and analysis.

Consider any costs associated with ongoing data review. For each cost, identify the **individuals or groups responsible** for those costs and the **funding source** that is planned.

Table 3: Activities supporting ongoing (post-project) data review

|  |  |  |  |
| --- | --- | --- | --- |
| Description of activity | Timelines / frequency | Individual(s) or group(s) responsible | Costs and/or other considerations |
|  |  |  |  |
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## Plans for Responding to Data

Describe how data owners plan to respond to data if warranted (i.e. what processes will be followed in the event that review of the outcomes data indicates a change is required?).

# Capacity to Sustain

## Resources

Identify resources that will be required in the business area post-project (e.g. positions created during the project or positions that will need to be created following transition). Describe how those resources will be funded. Consider if the business area has capacity to maintain the required resources, or what alternatives will be put in place to support those requirements.

## Training and Development

Describe **activities** associated with the training and development of existing and new staff post-project. Identify the **individuals or groups responsible** for those activities. Include processes to determine learning needs and proposed plans to address those needs.

Consider potential **costs** associated with training and development of staff. For each cost, identify the **individuals or groups responsible** for those costs and the **funding source** that is planned.

Table 4: Activities supporting training and development

|  |  |  |  |
| --- | --- | --- | --- |
| Description of activity | Timelines / frequency | Individual(s) or group(s) responsible | Costs and/or other considerations |
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## Considerations for Ongoing Engagement

Effective stakeholder engagement is a critical determinant of implementation success and is similarly critical for sustainability following transition and project closure. Identify key stakeholders that are likely to impact sustainability post-project. Describe important considerations or recommendations to support stakeholder engagement. List specific engagement **activities** that may be required or recommended. Identify the **individuals or groups responsible** for those activities, and any associated costs.

Table 5: Activities supporting ongoing engagement

|  |  |  |  |
| --- | --- | --- | --- |
| Description of activity | Timelines / frequency | Individual(s) or group(s) responsible | Costs and/or other considerations |
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# Issues Management

Describe how issues will be monitored and resolved post-project. Include processes and individuals/groups responsible for issue monitoring, reporting, escalation and resolution. Consider processes to support issues management at both local and higher organizational levels.

# Communications

Describe plans to support ongoing communications post-project, including (but not limited to) communications regarding:

* Outcomes reporting
* Issues escalation
* Questions from local levels to higher organizational levels
* Changes to content/processes
* News stories

# Key Contacts

List all key contacts (project team members, contacts from impacted business areas, support resources involved during or after transition, etc.).

# Review and Approval

The purpose of this section is to clearly signify that all key decision makers and impacted stakeholders have reviewed and approved the project transition plan.

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| **Name**Title |  |  |  |  |
| Name and title |  | Date |  | Signature |
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| **Name**Title |  |  |  |  |
| Name and title |  | Date |  | Signature |
| **Name**Title |  |  |  |  |
| Name and title |  | Date |  | Signature |

# References

The following documents are reference materials that provide context and support information included in the transition plan.

|  |  |
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| Document | Name and version number  |
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