

# THE ESSENTIAL GUIDE FOR MISSION-WIDE TRANSITIONS: LEARNING FROM ONE USAID MISSION'S EXPERIENCE

## Why is a Mission-wide approach to staff transition important?

Knowledge sharing, relationships, and overcommunication are key to a successful transition. Every USAID staff transition affects both the work and the people: those rotating in, those rotating out, and those remaining. **A smooth staff transition allows for agile continuity of the Agency's lifesaving work.**

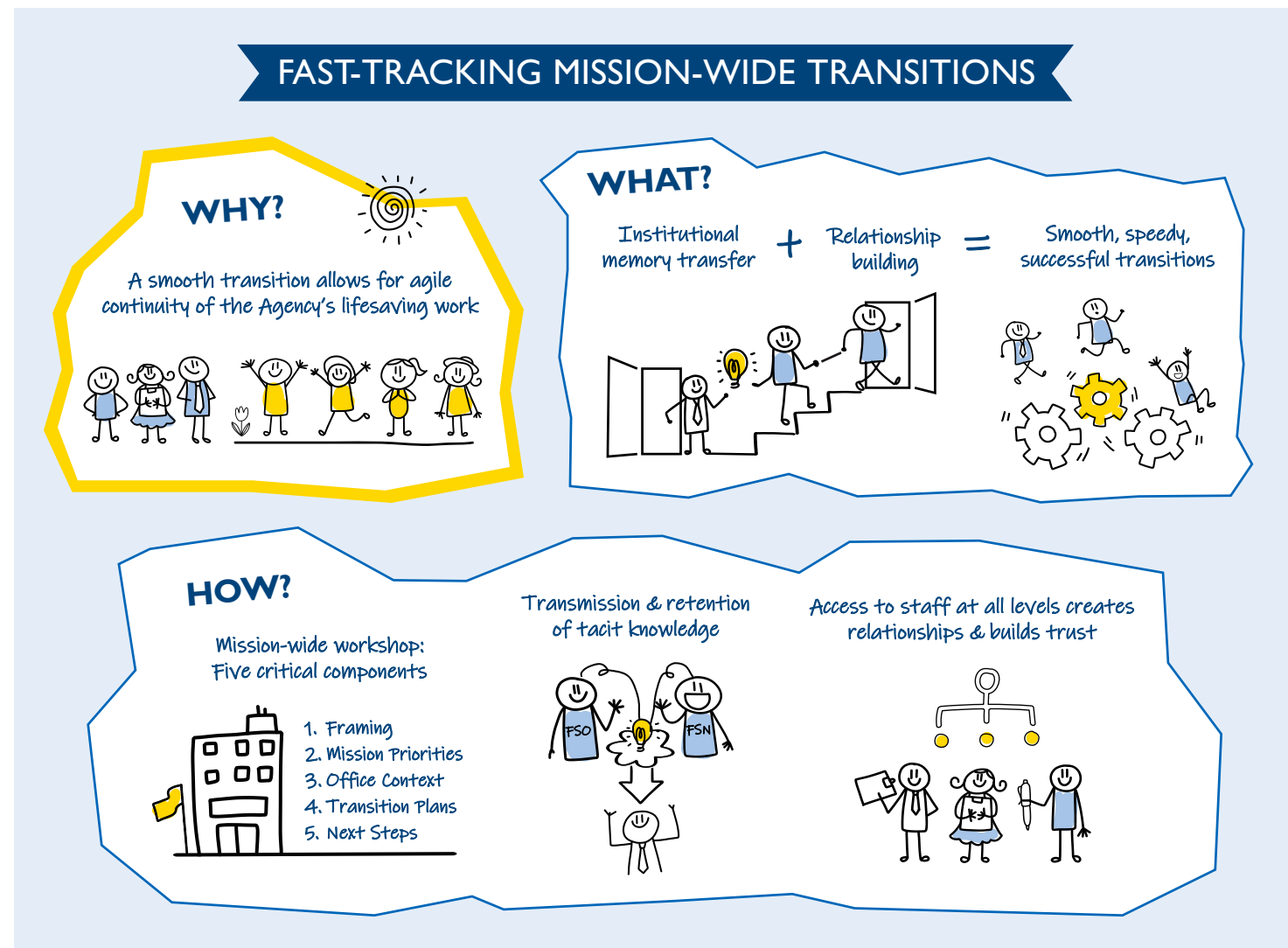
## How can we achieve a smooth transition?

**Collaborating**—not only between the two people transitioning but also within the office and Mission overall. It is about listening and **learning** what is effective and what's important; then **adapting** to the new context and, for everyone, to new people. The faster the team (including new staff) functions efficiently to do their work, and to collaborate across teams, the more likely Missions are to be agile in their adaptive management. Organizational and team tacit knowledge must be readily available in an easily actionable form, possibly documented in an office-level transition plan.

## Why a Mission-wide workshop instead of a standard handover memo?

In the international development context, teams must adapt quickly. **The quicker teams become fully operational, the quicker they can pivot and adjust to the ever-changing context.** In one Mission, USAID invested in a Mission-wide strategic transition planning workshop (in partnership with its Monitoring and Learning Support Contract implemented by EnCompass). This workshop created opportunities for all those concerned with the transition to engage in the **transmission and retention of tacit knowledge** and **relationship building**. With many transitions happening, bringing everyone together allows the entering and existing staff to interact with each other, as well as office-level team members and staff across the Mission.

One USAID Mission conducted a 4-day, in-person Strategic Transition Planning workshop in both 2023 and 2024. This guide presents the benefits of such workshops and how Missions can tailor the design to fit their unique Mission transition needs.



“ I think the workshop gives incoming and remaining staff a huge advantage to be able to start working immediately on issues and have a better understanding of personalities and expectations.

—Participant, Strategic Transition Workshop, 2024

## 5 CRITICAL COMPONENTS OF THE WORKSHOP

Whether the Mission is experiencing a transition of 20 or a few staff positions, the key is focusing on the office and across the Mission, not just the rotating pair. Based on one Mission's experience, the following are considered critical content.



### 1. FRAMING

- Create motivation and a vision—effective transition allows for the continuity of USAID's life saving work
- Share understanding of the Mission's important work
- Hold space for prioritizing staff well-being and relationship building

### 2. MISSION PRIORITIES AND STRATEGY

- Mission strategy, USG context, and country context
- Leadership priorities/Ambassador's priorities
- FSNs are a critical resource for incoming staff

### 3. OFFICE CONTEXT

- The team and how it operates
- Individual team member roles and responsibilities
- Team accomplishments and upcoming priorities
- Content and direction of Portfolio (if applicable)

### 4. OFFICE-LEVEL TRANSITION PLANS

- Consider types of knowledge staff need to do their job successfully
- Apply intentional and strategic thinking
- Identify key priorities for focus at transition time: Where will their attention need to be placed first upon arrival?

### 5. NEXT STEPS

- Mission leadership—Provide inputs and feedback into office transition plans
- Team level—Revise office transition plans and identify dependencies
- Mission leadership—Commit to support needs identified in transition plan
- Identify knowledge management considerations and needs

For questions or more information please email [MEL@encompassworld.com](mailto:MEL@encompassworld.com).

Developed by Kasia (Kedzia) Hatcher and Lynne Franco of EnCompass LLC  
Designed by Samantha Herrick of EnCompass LLC

## THE WORKSHOP CONTENT CAN BE ADJUSTED TO DIFFERENT MODALITIES

Missions come in different sizes and work in different contexts. The workshop structure, with its focus on effective institutional memory transfer and establishing new team relationships, can be adjusted for duration, scale, timing, and format.

### ADAPTATION OPTIONS

#### Duration



The workshop was 4 days, but with smaller transitions, it could be 1-2 days, even possibly a half day, or if virtual, broken up over several days.

#### Scale



**(Mission-wide by team)**  
The workshop optimally includes Mission-wide representation but could be done by office/team.

#### Timing

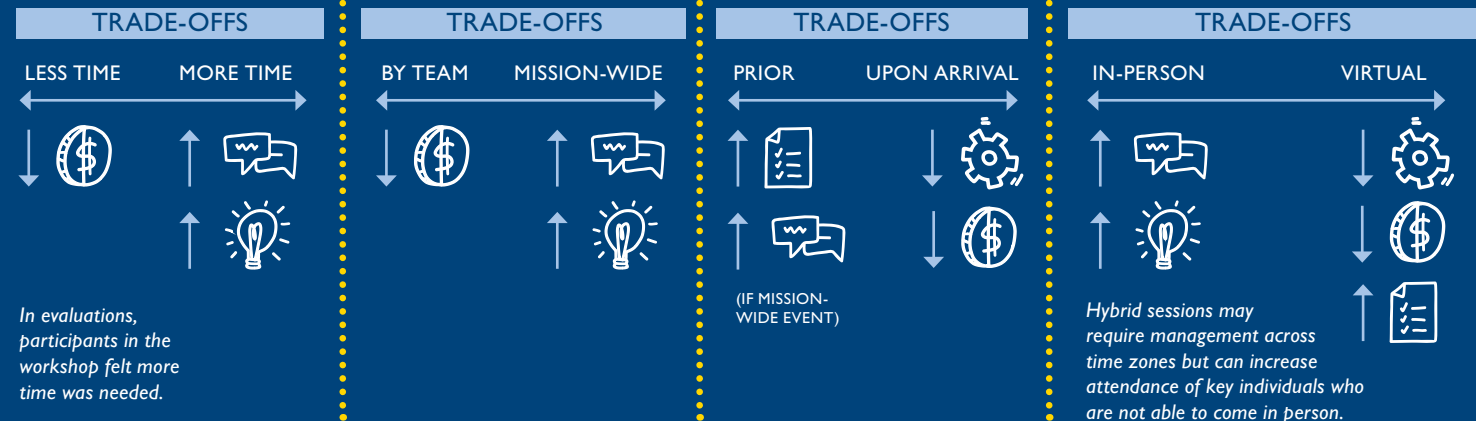


**(prior to transition or upon arrival at post)**  
Holding the event prior to the transition allows greater participation of exiting staff.

#### Format (in-person, hybrid, all virtual)



Each format requires about the same preparation. Hybrid sessions are more challenging to design and implement.  
*Workshop evaluations noted the value of in-person interactions.*



COST



OPPS/LOGISTICS



ATTENDANCE



RELATIONSHIP BUILDING



INSTITUTIONAL MEMORY/TACIT KNOWLEDGE TRANSFER

### WORKSHOP GOAL

**Productive transition initiated.** All participants feel involved, prepared, and empowered during the transition process.

### OBJECTIVES

- **Entering Staff:** Grounded in Mission's strategy, function, and context.
- **Entering Staff:** Familiar with their new portfolio and team, and have a foundation for productive relationships.
- **All:** Established priorities and milestones for early focus in transition and a plan to share implicit and explicit knowledge.
- **All:** Familiar with resources to support their well-being during transition and beyond.
- **During the Transition:** Remaining staff feel appreciated and empowered and departing staff feel recognized and appreciated.