

Planning Your Transition Team Worksheet:

What does your transition team look like? In times of organizational transition, having a well-identified transition team is essential. This team includes key stakeholders and partners who can provide support, resources, communication, or continuity of service.

- **Who are your internal stakeholders?** (Leadership, HR, IT, program managers)
- **Who are your external partners?** (Funders, training providers, employer partners, community organizations, media contacts)
- **Who can help with:**
 - Communications (internal and external)
 - Legal or compliance issues
 - Continuity of services to clients
 - Emotional support or workforce morale
 - Logistical or operational support (e.g., facilities, tech)
 - Providing Resources (i.e.: food pantry, housing, etc...)

Use this worksheet to map out your network:

Organization Name	Contact Person and Contact Information	Role on Transition Team (Key Responsibilities or Support Area)	Priority Level (High, Medium, Low)

Suggestions for Use:

- Fill this out as a team exercise during a staff meeting.
- Review and update annually or during strategic planning.
- Share with leadership and include in continuity planning documents.

Stakeholder Identification & Role Matrix SAMPLE

Organization Name	Contact Person/ Contact Information	Role on Transition Team	Priority Level
John Doe	Email Alternate Email Phone	Program Recipient	Medium
Local Workforce Board	Email Alternate Email Phone	Transition Planning Partner	High
XYZ Nonprofit	Email Alternate Email Phone	Referral Partner	Medium
Local High School	Email Alternate Email Phone	Education Liaison	High
N/A (multiple)	Email Alternate Email Phone	Support System	Medium
ABC Manufacturing	Email Alternate Email Phone	Worksite Partner	Low