***Text Legend*** *Delete this legend before finalising the document*

*Red text is an instruction and should be deleted after reading*

*Blue text should be edited or deleted as required. Change Blue text to Black if keeping*

*Black text should generally be considered as fixed text, however, can be edited to better suit the State Agency's requirements where necessary*

Contract Transition Plan

*[Goods and Services procurement templates - Contract transition plan]*

Contract Title:

[Insert the Contract Title]

Contract Number:

[Insert the Contract Number]

State Agency:

[Insert name of State Agency]

Prepared By:

[Name of Officer]

Date of Plan:

[Day Month Year]

# Purpose

*[Detail the purpose of the transition plan and what the plan’s objectives are. The section should also include an overview of the contract/s and the timeframe/period of transition.]*

The purpose of this transition plan is to outline how the (State Agency name) will manage the efficient and effective commencement of the incoming contractor and/or the new contract. It will also cover the orderly winding up of the current contract and/or the exit of the outgoing contractor.

## Objectives

*[Edit/add objectives as required.]*

The objectives of this transition plan are to:

* ensure the continuation of the supply of essential contracted Goods and/or Services;
* minimise any issues and/or risks;
* minimise the impact on end users and/or stakeholders;
* schedule or complete the transfer and/or return of records, information, equipment and/or assets; and
* establish the relationships, systems and procedures that will be used for the ongoing management of the new contract.

## Contract Details

|  |
| --- |
| **New Contract** |
| **Contract Number** |  |
| **Contract Title** |  |
| **Incoming Contractor(s)** |  |
| **Contract Commencement Date** |  |
| **Expiring Contract** |
| **Contract Number** |  |
| **Contract Title** |  |
| **Outgoing Contractor(s)** |  |
| **Contract Expiry Date** |  |

# Transition Team

*[Identify the key transition team members, their role/s (i.e. incoming contractor, outgoing contractor, or State Agency), responsibilities in the transition, and which organisation they are from.]*

|  |  |  |
| --- | --- | --- |
| **Name and Position** | **Role/s and/or Responsibilities** | **Organisation** |
|  |  |  |
|  |  |  |
|  |  |  |

# Transition Tasks, Activities and Schedule

*[The complexity of the transition will dictate the level of detail required in the schedule. A Gantt chart could be used in place of the table below.]*

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity / Task** | **Start Date** | **Finish Date** | **To be actioned by** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Risks and Issues

*[Detail any risks and/or issues that have been identified, and provide relevant mitigation strategies.]*

## Risks

The following risks have been identified

|  |  |
| --- | --- |
| **Risk** | **Mitigation Strategy** |
|  |  |
|  |  |

## Issues

The following issues have been identified

|  |  |
| --- | --- |
| **Issue** | **Mitigation Strategy** |
|  |  |
|  |  |

# Communication Management

*[Detail the communication methods that will be used to keep stakeholders informed and involved in the transition process. This can include transition team meetings, status meetings, progress reports, issue reports etc.]*

|  |  |  |  |
| --- | --- | --- | --- |
| **Stakeholder/s** | **Method** | **Frequency** | **Purpose** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Property Transfer and/or Access

*[Detail information such as what and how equipment, records, assets etc will be transferred to and/or from the incoming contractor, outgoing contractor and/or State Agency. It may also include how security access will be controlled (incoming and/or outgoing) for site access and/or IT access.]*

# Knowledge and/or Information Transfer

*[This is an important consideration as the transfer of knowledge is what provides continuity for the contract.*

*Detail information such as how knowledge will be transferred to and/or from the incoming contractor, outgoing contractor and/or State Agency. This may include the transfer of staff, the writing/transfer of instruction manuals/ documentation, conducting formal training classes, doing one-on-one training, etc.]*

# Handover and/or Acceptance

*[Detail the criteria and/or format required for the handover and/or acceptance of the transition. This may include detailing specific functionality and quality of certain deliverables, approval of an agreed checklist, formal signing of an acceptance certificate etc.]*