The Nature Conservancy

TIME TO EXIT?

Learnings from projects on how they are wrapping up and moving on

Based on interviews with two TNC projects in New Zealand:

- The Hauraki Gulf Shellfish Restoration Project (Te Moananui-ā-Toi)
- The Waikato River Waterfund

Photo: Revive Our Gulf

Hauraki Gulf Shellfish Restoration | Te Moananui-ā-Toi

Celebrating project success and working towards a High-Integrity Exit

Returning mussels to the Gulf

Healthy shellfish play a key role in maintaining the health of marine ecosystems. They filter the seawater and provide food, shelter and protection to a wide range of species, lifting its life force (mauri). But in the 1950s and 60s, the wild mussel (kūtai) reefs of the Hauraki Gulf were dredged heavily, leaving a fragile system behind. Bringing back the kūtai is part of an ongoing effort to restore the seafloor for native species to flourish.

Partner empowered to drive the work

After several years of implementing the project, partners had developed their own capacity to deliver the programme without TNC. This was a core milestone that TNC wanted to achieve, and was acknowledged as a success. However, this meant established roles were beginning to become unclear, and the partner had also started to apply for the same funding.

"The work started to become clunky, like two fish in the same pond competing for space." shared Restoration Coordinator, Peter van Kampen. "At that point, it's easier to elevate and empower the other fish. Why recruit more TNC staff when there are others who can drive the work?"

The idea to transition out of the work first came up during the project's Portfolio Review, and then was discussed with local partners, who were open to the idea.

The team also elected to run a Pause, Reflect and Adjust (PRA) workshop with support from the Agility Lab, which gave the team "space to reflect and be honest with ourselves as a group."

Knowing that both the partner and the TNC Project Lead were ready to move on "made the decision easier", shared Country Director Abbie Reynolds.

"We [TNC] are not in projects forever. We are here to unlock certain things, remove barriers, be a catalyst for action, then move on at a certain point."

— Erik van Eyndhoven, New Zealand Conservation Director

Putting the right processes in place

"Erik [Conservation Director, Aotearoa New Zealand] and I both knew we had a big job ahead that had direct implications for people on the team." shared Abbie. "A clear decision-making process about when we choose to exit, who to involve and how, needs to be set up for all our projects."

The team used a Project Management Plan (PMP) template to map out TNC's exit, and agreed on doing it in a phased manner. Having a "long tail" made it possible to manage remaining funds better, and hand over work being done by Peter, the project coordinator, to other partner organisations.

Lessons learned

"We can say high-integrity exit, but it's another thing to live it." shared Peter. The team emphasized that transitioning out is a time-consuming process, and requires budget and resources.

The Leadership Team needs to develop project review processes with associated timelines, clarity, and transparency about exit decision-making. Quarterly steering group meetings are vital to ensure progress is being tracked, and that leadership can lend a hand when needed. In this case, guidance and support from Human Resources was limited, and the team had to figure out how best to design a smooth transition for staff, whether it meant re-allocating them to other work, or having to let them go.

"It is also important for narratives to be controlled," shared Conservation Director, Erik van Eyndhoven. Exits have a negative connotation, so shared messaging had to be developed with partners to reduce reputational risks for all involved.

"At the end of the day, it's on us to ensure that we are careful and considered about expectations from the outset. We're not at the table just in service, but have things we want to achieve. Great partnerships come from creating shared goals and how we get there."

As TNC fully transitions out, the Hauraki Gulf Shellfish Restoration project will continue under the leadership of The Revive Our Gulf project partners — Mussel Reef Restoration Trust, The University of Auckland, Ngāti Whatua Orakei, Ngāti Manuhiri Settlement Trust and Ngāi Tai Ki Tamaki.

2

WHY exit* a project?

There are many reasons that project teams decide it is time to move on from a project. Exiting can benefit your team and your work in various ways.

Passing the baton to a more sustainable candidate

TNC's role is often to kickstart conservation activities and create innovative, new practices for others to adopt. In the long run, we want communities and/or local organisations to be empowered to take the lead and grow on-ground capacity so that the work we started can have a long-lasting impact. When such a candidate is ready and available, it can be in everyone's interest for TNC to bow out and/or reduce its role.

This scenario should be considered and designed from the outset and celebrated when it happens.

Redirect resources to higher impact work

Exiting can help TNC redirect and focus its efforts and resources on other work that needs attention, areas where we are better suited to support, or projects with greater potential for impact.

TNC is an organisation with finite resources, and sometimes we need to make hard decisions about how to allocate them, including investing in new, emerging and innovative ideas.

Clarify TNC's role as an organisation

When our presence is no longer providing the intended value, it may be time to move on. TNC's strengths often lie in convening stakeholders and providing insights from our global conservation portfolio; and depending on the project, less on day-to-day implementation. It can be helpful to keep our added value clear so that people know when to come to us and how to best tap into our expertise.

Achieving milestones or reaching your "End Game"

At the leadership level, the New Zealand Business Unit developed a [decision-making process](#) to identify when and under what conditions TNC should exit projects. Internal reviews were used as an important moment for staff to pause and assess whether project outcomes were being met.

We should be honest with ourselves that not all of our ideas are going to work. Exit criteria should be built in from the start, taking into account that future conditions and TNC's role will change. Alternatively, a project could aspire to different types of "End Games" as part of its design — learn more [here](#).

*"My vision for TNC is for us to be so good at our role that we no longer exist. The same sentiment exists at the program level. It's the ultimate sign of success. The mahi** one day should sit at the community level entirely."*

— Peter van Kampen, Shellfish Restoration Coordinator

*The thoughtful process of pausing, withdrawing out of, and/or transferring existing work to partners ([Responsible Work Transitions Guidance](#))
**the work necessary to get the job done

SIGNS a project may be ready to close

We should not assume that TNC's role in a project will exist in perpetuity. Conditions change, and exits can either mean it is time to redirect resources, or that we have succeeded in catalyzing local ownership.

A shift in enabling conditions

It could that the conditions that were present or expected earlier on in the project are no longer there. Or that there has been a political shift, a key champion has left or team capacity has changed. Somehow, the timing and conditions for the work are no longer suited for success.

For example, with the Waikato Water Fund, the team recognized that the intention and desire of indigenous partners to progress the work was not there, particularly given their limited capacity.

Partners seem ready to take over the work

Partners that we have been working with on the ground have increased capacity to take on a stronger role, and are comfortable with TNC reducing its presence. Relatedly, it could be that TNC no longer feels needed or relevant.

In the case of the Hauraki Gulf, some partners were starting to apply for the same funding and naturally took over areas TNC was previously leading on.

Not contributing significantly to TNC's 2030 goals

Even though the work is likely having an impact, it might not be delivering at the scale desired to be a good return on investment (ROI), or the work is not contributing enough to TNC's 2030 goals to justify its continuation.

Roles or added value of each partner is unclear

It could be that the division of labour is unclear, or there is a gap in capacity that is not being fulfilled by TNC or other partners at the table. This may be leading to stalls and bottlenecks.

Things are moving too slowly to "move the needle"

Making a difference or reaching significant milestones may require more time, financial resources, or longer relationship development than what TNC is realistically able to invest in.

For example, with the Waikato Water Fund, there was noticeable fatigue in the team, and funders were losing patience and considering pulling funding as early as the project design phase.

We're already spread too thin

Are we trying to do too much with too few people? Doing less could help us achieve more.

"Running 6-7 projects with one conservation director is unsustainable. Exiting helps free up time and reduces stress. We've had lots of kudos for doing the hard thing."

— Abbie Reynolds, Country Director for Aotearoa New Zealand

BARRIERS to exit or challenges to be prepared for

Deciding to exit from a project is just the first step in a thoughtful process. Exiting requires a lot of time, effort and consideration for team members who will be worried about their future and reputation.

Exiting can be costly

Both in terms of financial and human resources. You need a dedicated budget to follow through on the exit. In the case of the Hauraki Gulf, the project lead had to spend 50% of their time on "exit" activities, and plan for reduced involvement year on year until TNC fully transitioned out—which can take 2-3 years.

It could be worth looking into setting up an internal TNC fund that supports exiting projects or incorporating an exit budget into project design.

Reputational risks and negative connotation of exits

There is an inherent risk in implementing an exit plan in a high integrity way. The narrative of why TNC decided to exit or how it is handled could be overtaken by others. It is important to develop shared messages with partners, so that all stakeholders have a way to talk about it. Exiting a project doesn't always mean ending the relationship, and it is important to set expectations in managing a potential future relationship.

Decision making and transparency on the path ahead

Exits can be a confusing time for everyone involved, internally and externally. Teams can get frustrated if they do not know why certain decisions have been made, what will happen next, or what is expected of them. Communicating a clear game plan, the reasons why, and outlining everyone's roles and responsibilities in the process is crucial.

Handling staff roles and job security

"There are very real personal consequences for the team." Staff can be worried about their job security and there needs to be an agreed cadence and schedule for how different roles will be phased out or transitioned, such as moving from full-time to part-time, or finding opportunities elsewhere within TNC. You don't want to lose good people because of poor process.

How to "project manage" the exit

TNC has yet to develop templates and processes specifically for exits, so it is not always clear who should be doing what and when. You may need to bring in dedicated capacity to manage the transition. Activities such as keeping track of available budgets and expenses are on par with any active project.

It is hard, and it takes time

It can take years to exit if you want to engage with partners in a way that makes them feel heard, respected and supported. The more you proactively manage expectations about potential exits, the more quickly you can exit responsibly.

We don't have the culture and habit of stepping back, reviewing the work, and asking honest and genuine questions. Doing things differently can be confronting for staff members.

— Erik van Eyndhoven, Director of Conservation, New Zealand

Photo : Ethan Kearns / TNC

FRAMEWORKS and tools that help

Delivering high-integrity exits is still a relatively underdeveloped process at TNC.
Here are some of the tools and processes that the teams used and/or recommended.

Develop sustainability strategies or exit criteria early on

A pre-mortem and/or developing exit criteria should be done early during project design and act as a way for the team to review and assess whether it may be time to pause, withdraw or exit. Exit criteria can also include achievements and milestones such as reaching one of our key outcomes, an intermediate result or project goal. The earlier these criteria are developed, the more confidence you will have in making decisions.

Regional Portfolio Reviews are also a key tool for mainstreaming sustainability planning across projects.

Portfolio Management and regular reviews

At key intervals during a project's life cycle, it can be useful to come together either internally and/or with partners and have dedicated sessions to pause and reflect on the work and agree on how the project may want to adapt based on real-world feedback. Regular internal and external reviews also help maintain better partner and team relationships, creating a culture of trust and support.

Portfolio Reviews also act as a useful internal checkpoint to discuss project progress and getting input from regional leadership on future directions.

The Agility Lab is a TNC resource that can help facilitate a Pause, Reflect, and Adjust (PRA) workshop.

Communicate how and when TNC will exit

When communicating the possibility of an exit with all key parties, to the extent possible, delineate from the beginning how TNC will exit from the project and how roles and responsibilities will be transferred. This could be part of the MoU from the get-go, or be added on at a later stage.

Your joint communication strategy for the exit can include items such as key messages around the exit, your collective stance, and who will do what during the transition.

A solid communication strategy re: exit

Develop shared messages so that partners have a way to talk about the exit. It should include:

- Who needs to be informed
- By when
- In what sequence
- What the story is
- How the decision will be rolled out (key steps)

Treat your exit like its own project

The Hauraki Gulf team used the HET Project Management template as a tool to design their exit as a project. The template includes key questions that were helpful to consider, such as "Why this, why now?", who needs to be involved and how, as well as templates for budget, timeline etc.

Decision-Making Template for projects

The New Zealand Business Unit created a decision-making process to help them assess a project's progress towards its original objectives and help decide whether to pause, pivot or continue the work as is. Here is their template.

TIPS to make your exit more successful

1

Have candid partner conversations BEFORE deciding to exit. Get their input and discuss possible paths before making your decision so that you are on the same page. Consider doing this at the beginning of the project if it feels right.

2

Exiting the work may not be exiting the relationship. Brainstorm ways that you can continue to add value to each other. Create shared goals and how else you might get there.

3

Drive your own internal reviews. Have regular internal check-ins with the team before formal reviews, so that you are prepared and know what is working well and what needs to change.

4

Start creating a positive culture around exits — Exits are a healthy next step for successful projects, so make them a part of the long-term plan. Build exits into budgets from the design phase. Celebrate staff who self-nominate an exit, and do your best to find them another role.

5

Look for opportunities for professional development. Think of ways to transition staff so that it builds their capacity and leverages their skills, such as fellowship opportunities, other projects that need their expertise, or a staged transition from their current role to a new one.

6

Lead with honesty, transparency and clear structure. Set up meetings to communicate how decisions are made, and provide scenarios and options for team members and partners. Have those difficult conversations. Be realistic about what needs to happen.

7

Keep relevant people involved and updated — funders, partners, and even key parties on the periphery. Keep key communication platforms up-to-date.

8

Set your partners up for success. Make sure your exit plan includes how (incl. associated budget) you can empower partners to take the lead.

"Just don't be a d**k. Work to your best endeavours and abilities to make it a smooth transition.
Think of how you can be tika* and pono**. Work to maanaki*** your partners."

— Peter van Kampen, Shellfish Restoration Coordinator

*do things right | **honest, real | ***cherish, sustain

GAPS that still need support and/or resolving

Think of this as a wish list for teams considering an exit.

Clearer guidance from HR

There are currently no official guidelines on how to transition staff throughout the exit process. Much thought needs to go into how we might:

- Bring in HR support earlier in the review process

- Create internal opportunities for TNC staff whose job may be at risk

- Design the right cadence for staff transitioning from a full-time role to a minimized role, different role or another project

- Set up clear processes and compensation for staff who do have to be let go

Paying attention to shifts in enabling conditions or trends

- How might teams succeed at following shifts in power dynamics on the ground, politics in place, relationships between different parties or conditions within TNC?

- How do these changes affect the work and our progress towards our 2030 goals?

- What do we do when we notice these shifts?

Having an Exit Playbook

The teams we interviewed both spent a lot of time just figuring out how to exit, what needed to be done, and what steps were necessary. Having that outlined in some way could make things easier for teams.

Some contents of a playbook could include:

- Exit MoU template
- Common exit criteria
- Exit Communication Strategy example
- Staff reallocation or transition guidance
- Professional Development opportunities
- Budget estimates as a reference
- Internal Review guides
- HET Project Management template (adapted for exits)

Ways to support teams to incorporate all of the above

How might we leverage support from in-house resources such as the Agility Lab, CBD 2.0 or Highly Effective Teams to help teams design their full project life cycle?

How might TNC's involvement change over time so that exits are a deliberate and well-supported part of project design?

ADDITIONAL Resources

Here are more resources that may be helpful.

Conservation Gateway: Step Six of the Partnering section
TNC's Conservation Partnership Center offers a step-by-step guidance on working with partners, including a final section on adapting, improving or concluding a partnership. It also provides templates and case studies for reference.

Responsible Work Transitions Guidance

This TNC guide (see 10-pager and 2-pager) are draft documents that covers "the thoughtful process of pausing, withdrawing out of, and/or transferring existing work to partners". It includes typical challenges and best practices, as well as a case study from Floodplains by Design in the Washington office.

"Managing the concluding phase of a partner relationship should be conducted with exactly the same degree of care and attention to detail as managing the building phase — so that nothing is left incomplete or to chance."

— Moving On Tool Book

Moving on:
Effective Management for Partnership Transitions, Transformations and Exits

This Tool Book from The Partnering Initiative provides prompts for starting the conversation around exits, a checklist for sustaining outcomes after moving on, tips to assess the situation and hand things over, as well as external communication guidelines.

What We Know About Exit Strategies:
Practical Guidance For Developing Exit Strategies in the Field

This document reflects on C-SAFE's collective experience with Exit Strategies, and introduces different approaches to exits such as Phasing Down, Phasing Out and Phasing Over. It also gives guidance on exit criteria and includes planning templates.

What's your End Game?

This article from Stanford shares 6 types of "End Games" that a project or organization can work towards, helping non-profits determine what scale looks like in their specific case.

"There's a negative connotation about an exit — an exit is a failure. But we need to get it out there that an exit can be an achievement — that we set out what we had hoped to achieve."

— Erik van Eyndhoven, New Zealand Conservation Director

"TNC is working hard to solve really complex problems. Problems that governments and the private sector have failed at solving. We shouldn't expect that all of our ideas will work.

We have to build a culture of expecting these failures as part of the journey, as part of what it takes to be the bold and audacious organisation the world needs TNC to be."

— August Ritter, Managing Director,
Global Portfolio Management and the Agility Lab