

TRANSITION CHECKLIST

This tool provides a series of requirements to effectively transition or suspend campaign operations. As the need for community activation ends, the campaign operations and assets should be suspended or transitioned to another responsible party for continuity of operations. Below are sample campaign transition activities:

TRANSITION PLANNING AND EXECUTION

Transition planning and execution involve the identification of activities that will either be suspended or transitioned to another responsible party for continuity.

If continued:

- Identify the organization (e.g., government agency, public entity, private entity) responsible for continuing elements of the campaign. These elements may include the maintenance of community partner and scientific advisory group member relationships, campaign asset management, and campaign media management.

If suspending:

- Identify the government agency responsible for archiving the campaign assets.
- Understand the state of the public health emergency (PHE) at the time of campaign close-out and the probability of a future need to reactivate the campaign.
- Identify the strategy for resuming the campaign in the future if needs arise and ensure transition plan activities align with a potential resuming of the campaign in the future.

General activities:

- Determine the transition roles and responsibilities of community groups, civil rights experts, coalition (volunteers and other organizations that supported the PHE) members, and federal stakeholders
- Identify the activities and assets (e.g., creative assets, technology) that will be transitioned. Develop a plan and schedule for transitioning technology assets to the new responsible party. These technology products may include websites, source code, servers, ongoing assets storage, and archive require
- Develop a close-out or transition plan for the current campaign media, including paid media, social and other media commitments.
- Identify all contracts or grants that should be transitioned to a new responsible party or closed out per suspension of campaign activities, including all budget considerations and contract and grant
- Create an acceptance criteria and validation tracker.

COMMUNITY PARTNERS

It is important to notify community partners of the campaign transition activities, especially if the campaign responsibilities will be suspended, and continuously keep them informed as things evolve.

If campaign activities will suspend and will not be transferred to a community partner:

- Inform community partners and other stakeholders of all technology transition plans. Community partners may be impacted by the loss of access to technical campaign resources, including websites, repositories, and asset
- Develop a transition plan for community partners to include the following:
 - Timeline for all activities that impact a community partner such as technology transition dates and media communication
 - Final messaging, including ways to thank participants for their contributions to the campaign along with the timeline

- Introductions to other stakeholders to continue relationships within the campaign ecosystem
- Any partner activity and partner contact information reports to be delivered for all contributing stakeholders

RISK MANAGEMENT

- Risk management is a material component of campaign management and should continue throughout the transition.

For successful risk management, the campaign management team (CMT) should:

- Identify all risks associated with the transition or suspension of the campaign. These risks may include budgetary risks, reputational risks, or other risks associated with the suspension of campaign activities. If the campaign suspends, the CMT should document all risks into a risk register for future reference. If the campaign activities will be transitioned, the CMT should document all risks into a risk register and identify mitigation strategies into a risk management plan.
- Create a transition risk management plan as input to transition planning. Risks can mature into issues if an effective risk mitigation plan is not in place. The risk management plan should include the following:
 - Definitions of common terms used during campaign activities
 - Risk assessment processes used by the campaign
 - Risk response and mitigation strategies to outline the way that risks will be resolved
 - Risk monitoring approaches to identify new risks and to reassess existing risks throughout the next campaign

FINAL REPORTING

To appropriately document the activities associated with the campaign, the CMT should:

- Document procedures the campaign established for required activities such as content creation, issue reporting, task generation, requirements gathering, and final reporting.
- Conduct a final assessment of campaign outcomes and impact.
- Conduct lessons learned sessions and document the findings for application on future campaigns and policy.
- Package and archive all documentation and assets associated with the campaign.
Modify the community activation campaign playbook, as appropriate.

ARCHIVE

The campaign activities will be executed using federal funding. Therefore, the CMT must properly archive materials generated as part of the campaign and in compliance with government policies.

- Archive all documents and assets including:
 - Data contained on performance dashboards (e.g., website activity, modeling, social media) for future benchmarking and reference
 - Documented procedures
 - Technology
 - Creative assets and materials developed as part of the campaign