3 / ENDING

Ending: Guiding Questions

A strategy may move from Implementing to Ending based on several possible scenarios, for example: the original timeframe has been completed; the external context changes such that the strategy will not be successful; outcomes and impact are achieved faster than expected; or lack of outcome achievement prompts a change. Staff wind down strategy execution through an end, exit or legacy:

- *End*: when networks, infrastructure, or projects will not face catastrophic disruption if funding ceases, we may end a strategy. It can also apply to RFP-type grantmaking that is naturally concluding as part of a time-limited effort. Typically the decision will be communicated prior about a year before ending.

- *Exit*: conclusion of support trigged by various factors can result in an exit, such as strategy's time and budgeted resources have been spent, goals have been achieved, or implementation is not proceeding in line with expectations. Exit plans are developed to minimize potential harmful impact on grantees, and may be implemented over two to three years.

- *Legacy*: a final legacy phase may be appropriate to: secure a strategy's progress and sustain results; celebrate what has been accomplished; disseminate research, evaluations and lessons; invest in infrastructure and lay the foundation for next generation work by others; and/or manage risks associated with the Foundation's departure. This phase typically lasts two to five years.

During an Exit or Legacy phase, a capstone investment or project may be appropriate. A capstone is a time-limited project or effort that serves as a distinctive, culminating activity for an area of work or strategy.

There is typically a greater focus on learning for and communicating to the field as work is ended.

▤ **Products resulting from these guiding questions:** Exit Paper; Documentation of exit questions and staff reflecitons

Guiding Questions

Overview

1. Why is the area of work being ended?

Where we have been

2. What was our strategy or approach? What were our goals?

3. What grants were made? List of grants in force (Appendix)

    a. Organized by category (e.g., goal, cluster, theme, work plan elements, other, etc.)

    b. Categories ordered chronologically by end date

    c. Flag project support, general operating support and institutional support

d. Flag grants to anchor institutions

e. Flag grants that are long-standing (10 years or more)

4. What was accomplished? What evidence do we have of these accomplishments?

How will we exit

5. In Exit or Legacy phases, what is the scope for the final phase?

a. Brief proposal for final phase of work, including goals and approach to achieving them, expected dates by which grantmaking will end and by which all legal commitments will have expired.

b. Proposed grantmaking, with dollar amounts by year.

c. How will we know if Legacy goals have been achieved?

6. What are the risks for exiting, including the impact of exit on:

a. Partnerships

b. Area(s) of work

c. Grantee organizations

d. Foundation's reputation

7. What is our Communications plan for exiting? What are our messages for exiting for:

a. Grantees

b. Partners

c. Public

Staff reflection

8. What have we learned from implementing this strategy?   What lessons could be applied to the foundation in future work or other areas of work? What lessons can be memorialized and shared internally? Externally?