



## Learning to leave well: lessons from an exit review

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# Foreword

**Thank you for taking the time to engage with and read this Exit Review, which summarises the key recommendations of a review carried out by Triple Line Consulting on behalf of Porticus. We appreciate the input from all partners and staff who participated in the review. Their contributions were invaluable to our learning process.**

We commissioned this review because Porticus underwent a difficult transition and exiting process in the Building Future Generations sector over the course of 2023/2024. This was the result of a sector strategy refresh in 2022, triggered by an ask for greater focus in order to maximise impact. You can read more about our strategy 2023–2029 here: [Priorities | Building Future Generations | Porticus](#).

For both the strategy refresh and the exits, we decided to focus on a few key principles:

- Reduce the overall number of geographies where we would work in order to not stretch our resources too thinly.
- Focus on regions where the global learning crisis is at its most acute – low- and middle-income countries, particularly in the ‘Global South’.
- Build off existing work and relationships as much as possible, rather than focus on new topics or geographies.
- Respect existing programme commitments, grant commitments and/or contractual arrangements with partners.
- Provide additional funding and support to partners where needed to help them bridge into our new strategy or transition from Porticus support completely.

While we had the best of intentions and I think we got a number of things right, we knew there were bound to have been things we could have improved. Therefore, we wanted to invest resources and time to understand this. This report has shown us that very clearly, for which I am very thankful for the excellent work of Triple Line, our team and partners who contributed to it.

We have already held excellent internal reflections on the findings from this review and we are using it to shape the work under our 2023-2029 programming. We would also be very open to discussing and engaging with other organisations about our experience if this would be useful. I think it is critical that philanthropic organisations like ourselves, and other funders, reflect on what sustainability and exiting well really means. These aren't just buzzwords. We want to find the best ways to have clear strategies and support partners to generate maximum impact in ways that are catalysing efforts. We want to innovate and take risks to help systems be bolder and more effective, but not create parallel systems or false expectations that our funding support will or should exist forever. We commit to making sure this review isn't just a report that sits on a shelf. Please do reach out to us if you would like to discuss it with us further.

**Rob Doble**

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## Introduction

**Porticus is a philanthropic organisation that aims to create a just and sustainable future where human dignity flourishes. Porticus supports organisations to deliver interventions that contribute to systems change and benefit future generations across four key areas of work: education, society, faith and climate.**

Since 2016, Porticus' work in education has focused on Whole Child Development (WCD) for children and young people living in extreme adversity. In 2020, this work formally became known as the Building Future Generations (BFG) sector, which covered three portfolios of work: Early Childhood Development (ECD), Primary, Secondary and Technical and Vocational Education and Training (PSET), and Education in Displacement (EiD). In 2021, Porticus' governing board introduced the concept of 'Challenges' to define Porticus' long-term strategies within each sector. In 2022, the BFG sector identified two challenges to address: the Socio-Emotional Learning (SEL) of Children in Displacement and Children on the Margin in the Global South, aged 3–15 years. This re-focus resulted in the closure of ten of the 17 ongoing programmes<sup>1</sup> and five (out of five) clusters of work that had not yet developed into programmes. The exits occurred in all programmes operating in the United States of America (USA) and Europe, all programmes in the ECD portfolio, and programmes within the PSET portfolio that operated within geographies that were no longer a priority in the new strategy (USA and Europe) or those that targeted older age groups (e.g. TVET).

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<sup>1</sup> Porticus' definition of a programme is a group of partners and grants working together to achieve a shared set of strategic goals, complemented by activities, advice and support from the Porticus Programme Manager. For the purpose of this Exit Review, a programme exit refers to the closure of a set of grants, as opposed to an individual project or grant. A 'cluster of work' refers to a group of partners and grants that were in the process of developing into a programme, but had not yet developed a long-term strategic programme.



These recommendations were produced as part of an Exit Review conducted by Triple Line Consulting between 2023 and early 2025, commissioned by Porticus. The review examined 15 exits (ten programmes and five clusters of work) within Porticus' Building Future Generations (BFG) sector, most of which occurred earlier than anticipated due to a change in strategy. The review consisted of an external literature review of philanthropic exits, interviews with partners, external practitioners and Porticus staff, and six deep-dive case studies into a selection of the BFG programmes that closed.

# Deciding to exit



## Recommendation 1: Align exit decisions and criteria to the funder identity.

The literature suggests that exits should ideally only occur when a) sustainable results are likely to have been achieved and b) the criteria for selecting exits is in line with previous messaging around investment duration or strategic focus. Literature highlights the importance of ensuring all staff and partners are aware of the funder's organisational perspective on exits (i.e. what an exit is and when they are appropriate), and carefully managing any communications about the rationale for one, which could be seen by recipients as contradicting earlier messaging. Where programmes are closing because of unexpected internal strategy shifts, it is important to reduce potential reputational damage (both to the donor organisation and grantee partners) by managing communication of these changes to staff and grantee partners very carefully. Funder communications and guidelines should clearly outline what the organisation's expectations are – when the organisation will/might plan to intentionally leave contexts and what information will be considered to inform decisions. Staff at all levels of the organisation should be made aware of the organisation's guiding vision to ensure all external communications are transparent from the start of all partnerships.

In the case of Porticus BFG, partners and Programme Managers interpreted the original BFG strategy as a commitment to invest in long-term (i.e. 10-year) programmes focused on systemic change, broken down into two or three programme phases. Due to an internal need to re-design the strategy in 2022, ten programmes and five clusters of work ended after their first phase, which was earlier than the 10-year horizon anticipated by staff and partners. The perceived prematurity of the exits, and contradiction of previous messaging around long-term investments, presented operational challenges and made it a more difficult process to go through for staff and partners alike.



## What is an exit?

We define an exit as a process that organisations go through to close a project or programme when funding, provided to one or more partners to implement it, comes to an end. Exits can be planned or premature. A **planned exit** is when all parties know in advance when and why funding will cease. A **premature exit** is when parties have been working on the understanding that funding would or could continue up to or beyond the end of the current contract, but a decision is taken to end it sooner than this.





## Recommendation 2: Consider the potential impact of the exit on each individual context and adapt decisions (whether, when and how an exit will take place) and any post-exit support accordingly.

The impact of exits vary, depending on their timing, what stage the programme has reached and the maturity of the programme's focus topic in the ecosystem. Factors to be considered when deciding the optimal timing may include a) whether or not the exit fits naturally with the programme life cycle, b) the level of programme ambition, e.g., whether the programme is focused on local or community level changes or longer term goals such as national policy change, or c) whether the programme is at or near a potential tipping point for change.

Exits entail loss of human capital as well as funding. The funder might mitigate this by providing non-financial post-exit technical or strategic support to partners or ecosystem actors afterwards, although the literature is inconclusive as to whether or not it is useful for a funder to maintain some kind of presence in the context post-exit. There are some benefits to funders playing an ongoing role such as offering advisory services for remaining networks, providing evaluation support, providing minimal funding to maintain knowledge banks, or playing an active knowledge sharing or convening role. Programme Managers often hold significant contextual knowledge and contacts which are lost if they are not kept on in an advisory capacity. However, literature also suggests that maintaining a post-funding relationship is not always necessary or appropriate and that influence diminishes over time. It suggests funders should ask local partners and funding networks whether they consider a continued non-financial presence would be useful or detrimental.



The BFG exit was less disruptive for programmes nearing the end of a particular phase than for those who were earlier on in their programme life cycle. For several programmes, the exit occurred when there were 'windows of opportunity' in the system which could not be capitalised upon as hoped. Although there was strong potential for results achieved at local and/or institution (school) level to be sustained, the exits appeared to have reduced the likelihood of systemic results at national and/or policy level being sustained, the latter requiring structural shifts in systems, resourcing and commitment, and needing a longer term investment.

Porticus Programme Managers provided considerable contextual knowledge and, in some cases, a wealth of connections and networks, providing significant support to partners during their exit grants. This support was unanimously valued and found to significantly mitigate the negative impact on partners. Post-exit, the loss of this thought leadership – both on the partners as well as the wider sector in general – was considerable.



# Internal management

Subsequent global decisions, internal support/guidance and actions when an unexpected exit occurs



**Recommendation 3: Clearly communicate the implications of the exit for staff and grantee partners as soon as possible.**

A decision to exit has immediate implications for staff and partners alike because it entails both strategic and operational changes. Internal communication about the decision process, its likely implications and the support planned for staff is as important as communication about the decision itself. Exiting a programme may lead to internal job cuts or changes and ongoing partner work may need to pivot. The literature suggests that senior management should consider: a) what it will mean for the duration of existing partner grants and current programme activities, b) whether staff roles are at risk (and if so, how redundancy procedures and/or potential complaints will be managed), and c) what it means for the partnership itself (particularly where the relationship is seen as a partnership to create change rather than an operational arrangement to manage a grant.)

Communication about the exit and its implications needs to be timely and clear. However, the literature highlights a tension between needing to communicate the decision and its parameters to staff as soon as it is made, and building in staff consultation to make the process more inclusive. An overly long consultation period can undermine rather than build trust among internal staff and increase uncertainties and concerns about the topics which remain open during the consultation period. Concerns can be mitigated if senior management take swift action to outline implications of the decision, guidelines, parameters and support that will be available.

The iterative nature of the BFG decision-making process led to incomplete communication to staff about how and when decisions were being made, which programmes would be included or excluded, when and how to discuss exits with grantee partners, and what the implications were for staff jobs.





#### Recommendation 4: Respect existing contracts, provide additional grants and allow reasonable timelines.



The literature recommends informing grantee partners about an exit as early as possible. This might mean communicating the exit as early as possible during the existing contract whilst retaining the flexibility to change course with the remaining funds. Alternatively, it may mean providing additional flexible multi-year grants after the announcement to extend timelines. While hearing about an impending exit can be frustrating and disappointing, early announcement can help partners to process the exit and its ramifications and enable deeper consultation, ownership and co-creation of a strategy. This is not to say that early communication trumps all other considerations, such as the clarity of the early messaging – early rumours without clear or formal messaging are likely to be detrimental. The literature also emphasises the importance of honouring both legal (contractual) and ethical (informal or spoken) commitments.

There are many examples of organisations providing exit grants to their partners to help them prepare and allow for good closure. The purpose of these grants can vary. They can be used as an extension of existing funding to help close activities or be used in a significantly different way to the original grant so as to shift the focus to sustainability of the partner organisations or programme results. Sometimes the donor allows the grant to be used for unrestricted purposes.

Porticus BFG senior leadership and programme management staff respected existing grants with all partners, which enabled pre-approved programme phases to be completed, and offered additional multi-year flexible grants for all programmes that were closing, surpassing what the majority of partners had experienced in other funder relationships.

Many programmes already focused on sustainability of results but had expected a longer timeline to reach them. Consequently, in most cases, exit grants were used to increase the chances of sustainability by slightly shifting existing activities towards ensuring the results achieved and learning and materials developed at the time of exit could have the biggest impact possible (rather than starting new activities). The Exit Review found that the additional grants, long lead times and flexibility for planning, significantly increased stakeholder perceptions that results were likely to be sustained beyond the closure of the programme.



# External communication and conducting programme-level planning



## Recommendation 5: Provide communications guidance and support to staff.

General practice is for Programme Managers to communicate exits to partners because they hold the direct relationship with them. However, there is consensus in the literature that senior leadership must be involved in the communication process. Programme Managers should be equipped with templates and guidance notes on what and how to communicate with partners (such as the exit rationale and organisational responses to frequently asked questions) and given the agency to adapt these as necessary. Such guidance helps Programme Managers to communicate effectively and ensures consistency in messaging across geographies. The literature also suggests that there should be frequent touch points with senior leadership for both internal staff and partners during an exit so that they do not feel isolated and unsupported. The literature finds that senior management's communication needs to be clear, precise and consistent so as to avoid staff being in denial, to show respect for staff, partners and communities, and generate alignment on the process among all stakeholders.

Communication of the BFG exit to partners was challenging for Programme Managers because it contradicted previous messaging about long-term partnerships focused on change at the system level. At the individual programme level, Programme Managers had to craft the narrative to justify the decision - particularly tricky in countries where Porticus would continue to work through its new strategy but where the existing partners work did not align with the new strategic focus on SEL and children aged 3–15 years old. Greater guidance and direct support for (or engagement with) partners could have been provided by senior management to support Programme Managers in explaining the rationale and process. Transparent communication from the Programme Managers, combined with their proactive and strategic support meant that partner expectations were, on the whole, well managed and helped to minimise any reputational damage.







## Recommendation 6: Co-create an exit plan from the outset



A prevalent theme in the literature is the importance of participatory practices and co-creating exit plans with partners at the start of any new funding, as well as with community members or other stakeholders where appropriate. Participatory planning with all partners is integral for building or maintaining trust during the exit process, and developing motivation and continued engagement, despite the prospect of the impending exit. It builds collective priorities with an invested interest in the outcome and helps them see it not as a 'programme exit' but rather as a 'transition' into a phase where the funder will not be around. Creating a joint vision can also be beneficial in developing accountability for it with both donors and partners.

The literature also highlights the importance of starting to design the exit plan at the beginning of a programme or relationship, regardless of whether one is already planned or not. Ideally, a plan is developed alongside the creation of the programme itself, which then allows for partner and programme sustainability to be mainstreamed across programme design. Having early conversations about the exit also clarifies from the outset that the donor's role is temporary and establishes realistic expectations for the partnership during programme implementation and its eventual exit. Communications (with partners) around the reality of an eventual exit should begin long before a decision has been taken. Upfront communication can help

to manage expectations and even lead to more focused programme planning for sustainable results early on. Early co-creation of an exit plan allows the donor, partners, and other stakeholders to develop an understanding of each other's ambitions and vision for future goals as well as identify any discrepancies, allowing potential issues, both related and unrelated to a potential exit, to surface early on. This can be particularly useful in the case of an unplanned exit. The instability or shock of the decision may still be difficult to process but can be slightly mitigated by the stability of a plan having already been agreed, with mutually understood next steps.

When the exit was announced, BFG Programme Managers were given significant flexibility in how to develop their exit plans. Each Programme Manager chose to co-design plans with partners (collectively or in one-to-ones) as much as was appropriate for their context, based on the unique needs of the programme and its partners. In most cases, partners had substantial autonomy to shape their final activities and identify their priorities for sustaining results beyond the exit. However, exits had not been discussed or planned for with partners or internal staff prior to the 2022 decision to exit.



## Recommendation 7: Plan for sustainability to reduce the potential negative impact on the partners and on programme results

While many funders consider general sustainability as part of the original programme or grant design, this aspect becomes particularly important when an exit is imminent. The literature review found that few donor organisations or partners proactively focus on the legacy they want to leave behind or take this into account when deciding when to leave. A complete exit, where no efforts are made to embed the positive results of the programme, can lead to loss of learnings and field knowledge (closing down websites, resources, thinning out files, etc.), and total disengagement from the programme topic by other stakeholders, including other funders. More concrete sustainability plans may include grantee capacity strengthening, network development, fundraising, or knowledge/asset generation and dissemination. The most effective method(s) of sustaining results will depend on the context.

Exits have a disproportionately negative impact on certain programmes and partners, such as organisations nascent to the field or smaller organisations who are reliant on one donor for a significant proportion of their overhead costs. Partner capacity strengthening becomes particularly important for sustaining results and minimising negative impacts in these cases.

A high level of trust and autonomy allowed highly capable Programme Managers to design their programme's exit phase in a short timeline, using their contextual and technical expertise to respond to the needs of the partners and sector to enable a responsible exit. Programme Managers took a variety of sustainability approaches in their plans. Senior management set out broad priorities which included: a) advocacy and sustainability, b) documenting and sharing learning/evidence, and c) additional opportunities for impact. The approaches taken by Programme Managers broadly fell within these categories, with several additional priorities such as strengthening the capacity of partners and partner networks; developing programmatic assets in the form of evidence, tools and reports that could sustain the programme's results and activities; supporting fundraising efforts to sustain both the programme itself as well as the individual partners; and developing stronger partner networks with the aim of developing a sustainable ecosystem within the sector.





# TRIPLELINE

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