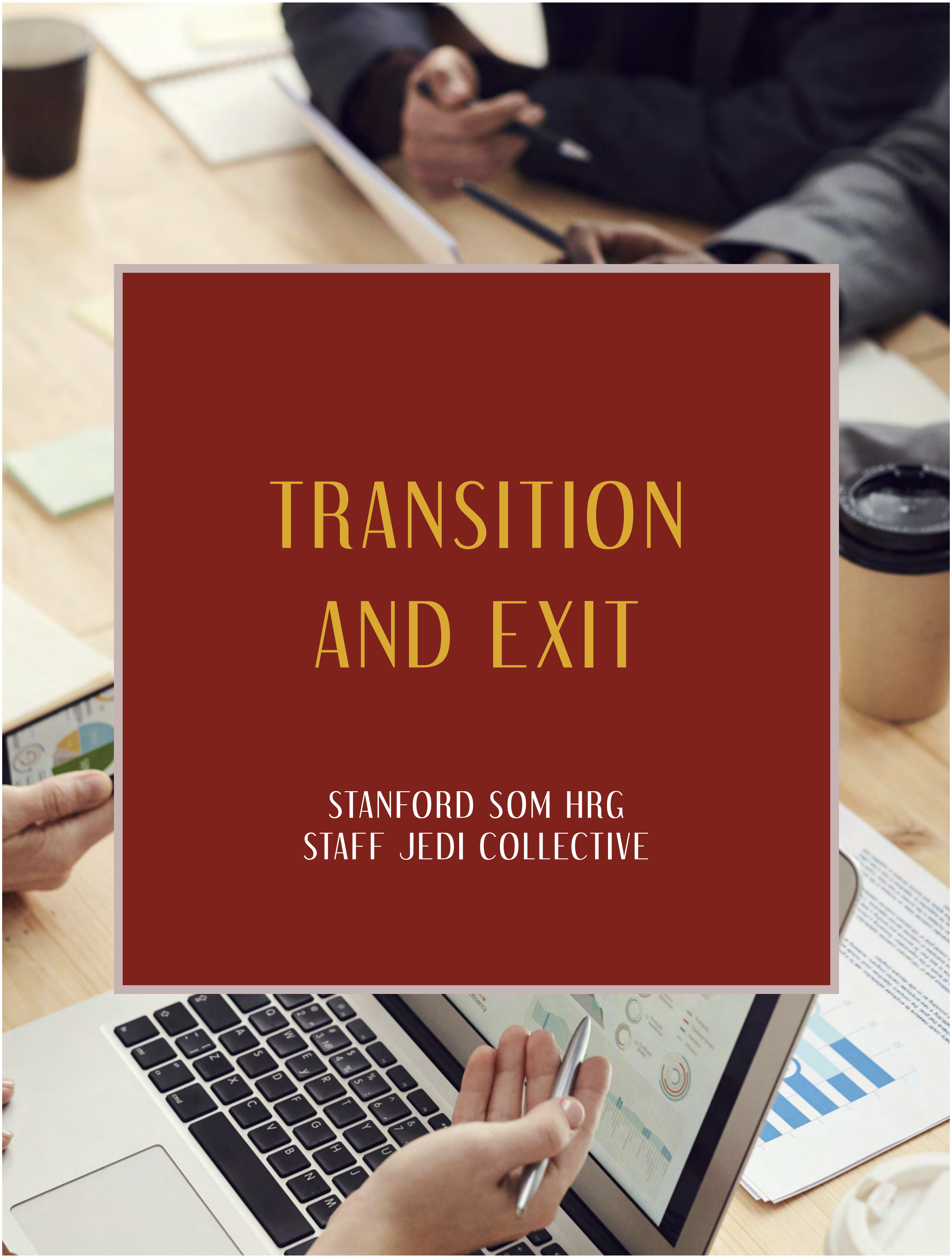

TRANSITION AND EXIT

STANFORD SOM HRG
STAFF JEDI COLLECTIVE

TABLE OF CONTENTS

STANFORD SOM HRG
STAFF JEDI COLLECTIVE

CO-CREATING A TRANSITION AND EXIT PLAN:

SUPPORTING DEPARTING EMPLOYEES THROUGH TIMES OF CHANGE

IMAGE DESCRIPTIONS
Two people analyzing a laptop together.

CO-CREATING A TRANSITION AND EXIT PLAN

STAFF JEDI COLLECTIVE.

INTRODUCTION

A transition or exit from a position can be a stressful process for any staff member or employee. For minoritized staff, in particular, this process can be additionally challenging given the various historical and systemic inequities that further issues like gaps in wellness, mental health, and (re)traumatization in the workplace. To better support minoritized employees and help reduce the stress inherent in the process, this guide provides supplemental resources to improve their transition or exit experience.

Employees may exit and transition out of a role for many reasons (promotions, resignations, internal transfer to other teams within an organization, or retirement). In addition, situations can arise where an employee may be away from a team for an extended period of time, such as medical leave or parental leave. Overall, an employee's departure from a team can cause undue stress and hardship for the departing employee, their supervisor, and their team. The stress may be further exacerbated by the identities of the individuals due to historic marginalization, e.g. racial and ethnic minorities, disabled individuals, LGBTQ+ individuals, amongst others, and overburdening them with tasks or unrealistic expectations.

Planning ahead by the manager and the employee can ensure a smooth transition and reduce stress and hardship, especially for the departing employee. This resource guide expands on the information provided by Stanford University HR to managers and offers customizable templates for departing employees. This guide can be used by a departing employee with their manager or their team to help create a transition or exit plan that reduces stress and ensures an equitable distribution of labor across the team post-departure. One best practice is for the supervisor to work collaboratively with the departing employee to co-create a transition plan with the critical information documented.

As a departing employee, using this guide can include reviewing the offboarding checklist template. The checklist may be downloaded and customized to best support you. Exit interviews are also included as an item of the checklists. For more information, see the Leveraging Exit Interviews to Cultivate Inclusive Work Cultures resource guide.

IMAGE DESCRIPTIONS

LEFT: Two people having a discussion with co-workers.

RIGHT: Hands pointing to a laptop.

RESOURCES

To support departing employees transitioning and exiting the organization, below are additional resources provided by Stanford University HR organized by common reasons an employee may leave. Each resource section also includes a suggested timeline to assist in proactively planning the transition when possible. We encourage you to build a custom checklist (see template below) with applicable resources. Please note some resources can only be accessed by managers and then shared with the departing employee upon request.

For Resignations Timeline (dependent on employee notification):

- Stanford University - Exits | Manager Toolkit Employment Checklist (available to managers)
- FAQs: When Employment Ends Information - Resignation/Termination

For Transfers Timeline (dependent on employee notification):

- Stanford University - Employment Transfer Info & Checklist (available to managers)

For Leave of Absences Timeline (any duration greater than 3 days):

- Stanford University - Leave of Absence Checklist
- Admin Guide Memo 2.3.5 Disability and Family Leaves
- File for disability benefits after 5 days

For Retirement Timeline (begin preparation 3 - 6 months before your intended last day of working):

- Staff Retirement Planning Guide
- Stanford University - Staff Retirement Info
- Staff Retirement Checklist

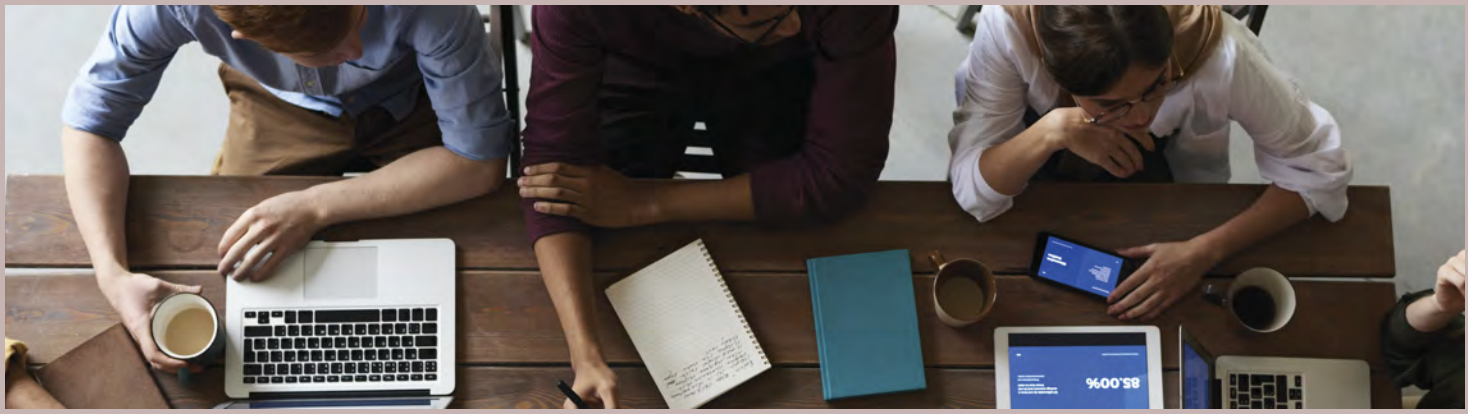

IMAGE DESCRIPTIONS

TOP: Two people working together. One is on their laptop the other is holding papger.

BOTTOM: Four people sitting around a table taking notes on multiple devices or notebooks

OFFBOARDING CHECKLIST

MANAGER: ______________________

EMPLOYEE NAME: ______________________

EMPLOYEE'S LAST WORKING DATE: ______________________

TODAY'S DATE: ______________________

- [ ] **Meet with supervisor to give in-person notification of exit (e.g. resignation, leave of absence, etc) as early as possible.**
- [ ] **Give supervisor an official written letter of resignation.**
- [ ] **Per Stanford Administrative Guide, at least two weeks' prior notice of resignation is expected from non-exempt employees. At least four weeks' prior notice is expected from exempt employees.**
- [ ] **Work with your supervisor on a transition plan detailing key responsibilities, status, and timelines during the time you have left (this depends on how much notice you have given).**
- [ ] **Give supervisor list of your general daily duties and responsibilities.**
- [ ] **Give supervisor a list of projects you are working on and a status report on each project outlining where you will have left off by your last day, with timelines and next steps.**
- [ ] **Give supervisor list of main contacts with position titles, email addresses, and phone numbers (i.e., faculty you support, departmental/external contacts for meetings you are responsible for setting up, etc.).**
- [ ] **Give supervisor list of main contacts with position titles, email addresses, and phone numbers (i.e., faculty you support, departmental/external contacts for meetings you are responsible for setting up, etc.).**
- [ ] **Before leaving, ask to schedule an exit interview with HR if you want to have one. At this time, your manager will complete a checklist of other action items including retrieval of work and computing-related property, submittal of final payroll/timecard-related items.**

OFFBOARDING CHECKLIST

PROJECT TRACKER

CURRENT PROJECTS AND STATUS PROJECTS THAT NEED PRIORITY ATTENTION TO ENSURE A SMOOTH TRANSITION.

PROJECT / TASK	STATUS	NEXT ITEM TO COMPLETE	KEY CONTACTS

IMPENDING PROJECTS AND STATUS: UPCOMING PROJECTS THAT ARE COMING UP IN THE NEXT [3, 6] MONTHS.

PROJECT / TASK	IMPENDING DEADLINE	ACTION ITEM TO START	KEY CONTACTS

RECURRING PROJECTS: ASSIGNMENTS OR PROJECTS THAT ARE ON A RECURRING CADENCE

ASSIGNMENT / PROJECT	FREQUENCY	NEXT DUE DATE	KEY CONTACTS

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DAY-TO-DAY TASKS:

WHAT ARE THE DAY-TO-DAY RESPONSIBILITIES? ANY TIPS TO ASSIST IN AN EASY TRANSITION OF DUTIES? A BRIEF EXAMPLE OF DAY-TO-DAY TASKS IS PROVIDED BELOW.

- **Financial Transactions**
    - State business clearly, include the who, what, why
- **Communications**
    - State business clearly, include the who, what, why
- **Administrative Duties**
    - State business clearly, include the who, what, why

RESOURCES: What is the information necessary to help with transitioning? Consider where files related to projects are located and where to find information, subscription services (SlideRoom, Asana, Google Drive, Box), etc.

OFFBOARDING CHECKLIST

STAFF JEDI COLLECTIVE.

PROJECT TRACKER

ADDITIONAL CONTACTS

CONTACT INFORMATION	DESCRIPTION

LOCATION OF FILE FOLDERS

URL	DESCRIPTION / USE	HOW TO ACCESS (DO NOT INCLUDE PASSWORDS)

RECURRING PROJECTS: ASSIGNMENTS OR PROJECTS THAT ARE ON A RECURRING CADENCE

URL	DESCRIPTION / USE	HOW TO ACCESS (DO NOT INCLUDE PASSWORDS)

OFFBOARDING CHECK-IN

DATE OFFBOARDING DOCUMENT COMPLETED: ______________________

DATE REVIEWED WITH MANAGER: ______________________

SECTION 02

LEVERAGING EXIT INTERVIEWS TO CULTIVATE INCLUSIVE WORK CULTURES

HTTPS://MED.STANFORD.EDU/HRG/JEDI.HTML

IMAGE DESCRIPTIONS
Two coworkers sitting at a table togher as if one is being interviewed.

LEVERAGING EXIT INTERVIEWS TO CULTIVATE INCLUSIVE WORK CULTURES

STAFF JEDI COLLECTIVE.

INTRODUCTION

Employees can exit and transition out of a role for a myriad of reasons. Exit interviews are a critical tool to capture feedback on what is and is not working well at the local level from the perspective of the departing employee to drive improvements. If you find yourself exiting or transitioning from a role in your department or unit, familiarize yourself with the local exit interview process as they vary across the Stanford School of Medicine.

IMAGE DESCRIPTIONS
LEFT: Two people sitting at a table having a discussion
RIGHT: A person writing in their notebook.

FOR THE DEPARTING EMPLOYEE:

The exit interview may be conducted locally by the manager or the HR business partner. Check with your manager about your local process and consider who is best for you to conduct an exit interview. The value of participating in an exit interview is that you are able to reflect and be candid about your work experience. It can assist you in feeling heard and valued. Exit interviews can also provide actionable data and insights into how managers engage with their employees and potentially change the overall departmental culture.

Moreover, utilizing exit interviews can be an equity-based strategy. Employees with minoritized identities (e.g., racial and ethnic minorities, staff with disabilities, LGBTQ+ individuals, etc.) can experience various challenges like exclusion, microaggressions, and other issues of bias. These interviews can be used to better understand their experiences and glean insight into making your organization's culture more equitable and inclusive.

This resource guide is a supplemental resource to optimize your exit interview experience by providing information to give you agency in the process.

You may discover that your department or unit uses one or both of the approaches to conduct exit interviews: 1) through a survey or 2) to conduct a live exit interview session. To ensure that you have agency and your needs are centered throughout the process, consider which formats are available and how to best care for yourself through the process. Employees who hold minoritized identities due to systemic inequities may go through undue stress or retraumatization in the exit interview process. This is an important consideration as you decide if you want to participate in an exit interview.

IMAGE DESCRIPTIONS

TOP: A person sitting on a chair holding a notebook.

BOTTOM: Image from Bryq.com

01

WAYS TO PREPARE FOR YOUR EMPLOYEE EXIT INTERVIEW:

EXIT INTERVIEW SURVEY CONSIDERATIONS

Surveys can be a great option to efficiently capture meaningful feedback; however, surveys may not allow you to go in-depth about their reason(s) for leaving the organization or other issues. Another benefit of surveys may be that your feedback is anonymous.

If applicable, consider requesting the exit interview survey questions ahead of time and writing responses in a separate document to provide time for self-reflection before officially submitting your responses.

02

LIVE EXIT INTERVIEW SESSION CONSIDERATIONS

Interviews can be held virtually or in person. However, you may have a preference for the setting (e.g., you may not feel comfortable disclosing details of your experience in-person). Share your preferred modality with the person conducting the exit interview (e.g. virtual or in-person, location on campus).

• **Who is involved in the live exit interview:** This will depend on the local department or unit process. This may be your manager or your local HR business partner or both. If you have preferences regarding who conducts the exit interview, you can express those to the person you are most comfortable with sharing.

• **Exit interview questions:** This will depend on the local department or unit process. You can inquire in advance for an agenda and what questions are a part of the exit interview process to prepare. You can also prepare your own questions to ask about next steps or to share beyond what is asked via the exit interview questions.

• **Participating in the live interview:** Below are some actionable ways to prepare for the live interview.

• Understand the process:

i. Request that the exit interview be scheduled at a time you can give your full attention. It is recommended to schedule during your last week of employment.

ii. Ask that the exit interview is in a quiet and confidential space, ideally away from where others can overhear your responses.

iii. Be prepared to ask about any separation questions you may have (i.e., final paycheck, outstanding bonuses, health insurance, COBRA, unemployment eligibility, retirement, etc.).

iv. Review communication strategies to help you navigate the discussion (e.g, L.A.R.A. framework).

IMAGE DESCRIPTIONS
TOP: A persons hands are passing another person some paper and a pen
BOTTOM: Two people sitting at a table working.

FOR MANAGERS:

The exit interview may be conducted locally by the manager or the HR business partner. Dependent on relationships, a departing employee may have a preference on who conducts the exit interview. Exit interviews can also provide actionable data and insights into how you engage with your employees and can potentially change the overall department/division's culture.

Moreover, utilizing exit interviews can be an equity-based strategy. Employees with minoritized identities (e.g., racial and ethnic minorities, staff with disabilities, LGBTQ+ individuals, etc.) can experience various challenges like exclusion, microaggressions, and other issues of bias. These interviews can be used to better understand their experiences and glean insight into making your organization's culture more equitable and inclusive.

This resource guide is a supplemental resource to optimize the exit interview experience by providing information to the manager.

You may discover that your department or unit uses one or both of the approaches to conduct exit interviews: 1) through a survey or 2) to conduct a live exit interview session. To ensure that the departing employee has agency and their needs are centered throughout the process, consider which formats are available and how to ask about their preferences. Employees who hold minoritized identities due to systemic inequities may go through undue stress or retraumatization in the exit interview process. It is important to be cognizant and thoughtful about how one supports their departing employees. Regardless of what option is chosen, it is important to keep the exit interview simple as the departing employee may be experiencing undue stress related to closing out their job duties prior to their departure.

HTTPS://MED.STANFORD.EDU/HRG/JEDI.HTML

IMAGE DESCRIPTIONS
TOP: A person writing in her tablet / laptop
BOTTOM: Image from Bryq.com

01

WAYS FOR MANAGERS TO PREPARE FOR THE EXIT INTERVIEW:

EXIT INTERVIEW SURVEY CONSIDERATIONS

Surveys are a great option to capture meaningful feedback without adding too much time and responsibilities to a departing employee; however, surveys may not allow the employee to go in depth about their reason(s) for leaving the organization or other issues. Another benefit of surveys is they can be anonymized.

If applicable and in congruence with your local process, consider using the Exit Interview Questionnaire designed by Western Connecticut State University's Office of Diversity and Equity as a starting place to design your own exit interview questionnaire.

02

LIVE EXIT INTERVIEW SESSION CONSIDERATIONS

Interviews can be held virtually or in person. However, the departing employee may have a preference on the setting (e.g., a person may not feel comfortable disclosing details of their experience in-person). As you seek to focus on the departing employee's needs, consider giving them the choice between a virtual or in-person exit interview.

• **WHO IS INVOLVED IN THE LIVE EXIT INTERVIEW:** It is recommended that the HR business partner conduct or be part of the live interview so that they can answer any questions the departing employee may have about separation resources. Be mindful that you may not be the ideal interviewer or be present during the exit interview due to confidentiality, personality conflicts, digression, and conflict of interests.

• **SELECTING EXIT INTERVIEW QUESTIONS:** Selecting specific exit interview questions may offer an opportunity for an open dialogue with the departing employee, who may have their own questions about next steps and/or offer perspectives beyond what is captured during the standard local process. For support in identifying additional questions, here are two resources:

- Forbes Human Resources Council
- Exit interviews: Your ultimate guide

If possible, share an agenda and the exit interview questions with the departing employee in advance so they can prepare accordingly.

• **FACILITATING THE LIVE INTERVIEW:** Below are some actionable ways to prepare and facilitate the live interview.

• **How to prepare for the process:**

i. Schedule the exit interview with the employee and HR personnel and yourself if applicable. It is recommended to schedule during the departing employee's last week of employment.

ii. Ensure the interview is in a quiet and confidential space, ideally away from where anyone can overhear their responses.

iii. Collect and be prepared to discuss separation resources (i.e., final paycheck, outstanding bonuses, health insurance, COBRA, unemployment eligibility, retirement, etc.).

iv. Review strategies that will help you in navigating the discussion if you are a part of the exit interview (e.g, L.A.R.A. framework).

IMAGE DESCRIPTIONS

TOP: Two people writing on a white board

BOTTOM: A person writing on their laptop while another person in the back is doing the same

WAYS TO PREPARE FOR YOUR EMPLOYEE EXIT INTERVIEW:

POST-INTERVIEW CONSIDERATIONS

Whether it is a survey or live exit interview, it is important to review the departing employee's responses and create an action plan moving forward.

• Use the exit interview opportunity to do a check within a specific area within your team or department or unit. This could be sending a broader follow-up survey to the entire unit or department in partnership with your HR business partner, or to do a smaller scale survey to your team. Be mindful that your team may not share openly and consider creating an anonymized survey.

• Identify issues or recurring problems (i.e., employee/manager concerns, retention issues, high turnover, etc.) that were revealed in the interview and actions that can be taken in response.

Finally, consider checking in with your central Stanford School of Medicine Human Resources Group partners for additional guidance on how to resolve the concerns brought forward and to foster a workplace culture rooted in justice, equity, diversity, and inclusion (JEDI). You can also reach out the SoM HRG JEDI team and review the resources compiled around resolving workplace issues.

IMAGE DESCRIPTIONS
TOP: A person sitting in a cafe working on their laptop

SOURCES

01

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ACCESS NOW