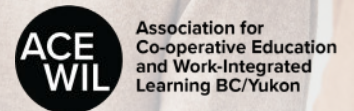




Talent **MATCH**

Talent MATCH is brought to you by:



# Offboarding:

## The What, Why, and How of Ending a Student Work Placement

Bringing an employee on board is important. You recruit, interview, hire, and train someone to do the work and be part of your team. But when their contract is up... do they just leave? If that's what's happening at your organization, you're missing out on an opportunity—and putting your business at risk.

While the following information is focused on the completion of student work placements, such as a co-op or practicum, much of this applies to all employees when they move on to other opportunities.

### What is Offboarding?

Offboarding includes all the steps leading up to the end of a contract or to an employee's final day.

The steps are:

- ◇ Knowledge Transfer
- ◇ Exit Interview
- ◇ Paperwork & Logistics
- ◇ Celebrating
- ◇ Implementing Feedback
- ◇ Following Up

## Why is Offboarding Important?

Offboarding can be a simple process but the impact will be positive for you, your student, and your organization.

Offboarding is a valuable learning opportunity. The feedback from your student employee can be used to help those supervising them become better managers, to improve protocols and practices, and to revamp roles for future student hires. Plus, allowing your exiting-employee to reflect on their time with you is a benefit to them. Hosting a work-integrated learning (WIL) placement means you are a partner in a student's education. Part of the learning process includes reviewing the work they did and teaching the people who are taking their place.

With improper offboarding, your organization could lose access to accounts, files, or software because that knowledge leaves with your employee. It may be a struggle to collect equipment or passwords when they are no longer obligated to you. An employee might also continue to have access when they shouldn't. While we hope an employee parts on good terms, there's always the possibility they won't. If they have access to your social media, for example, that poses a risk, even without ill intent. There are similar hazards with inaccurately wrapping up payroll, which could potentially leave your company open to legal action.

Not only can these incidents pose a risk to your organization's reputation, but if the employee leaves on a sour note, feeling unappreciated or cast aside, they will tell others. They could share their experience with their co-op office, or on sites like Glassdoor, where people leave employment related reviews—both of which can be detrimental to future recruitment efforts.

Proper offboarding mitigates negative ramifications. Plus, a positive experience is a way of fostering a relationship with staff for future succession planning.



# How to Offboard Effectively

Below we'll go through the previously mentioned offboarding steps and offer more context for each one. These will be different for each organization, but this will get you started or bolster your current offboarding plans.

Note that these are not in chronological order and some steps overlap.

## Knowledge Transfer

This includes sharing information on what the employee has been working on, the status of projects, and developing a plan for who to hand tasks over to. This can be done via a written report on the status and details of projects, the key people involved and who to report to, important dates and deadlines, and the software used for projects and routine tasks.

A final report template may be helpful when you're hosting a student. With a template, the knowledge transfer can begin as early as their first week. Encourage them to make notes about projects and tasks as they work on them, rather than cramming this report together in the last few days.

When you ask your student to write a final report, suggest that they are creating a manual for the next student who comes on board. Ask them to include a summary of their work, what programs they used, any tips and tricks for troubleshooting, recommendations for how to do things differently, as well as who they went to for information and guidance.

If possible, have the student-employee train the person who will be taking over their responsibilities. Training a peer can be a valuable learning opportunity for your student.

[Software Advice](#), a site that helps businesses find new software, suggests the following questions to guide the knowledge transfer process:

- ◇ Can you break down your daily routine into step-by-step instructions?
- ◇ Are there any projects that you repeat on a weekly, monthly, quarterly, or annual basis? What are they and how do you do them?
- ◇ How much time did you typically allocate for your projects or tasks?
- ◇ What files does your successor need to know about and have access to?
- ◇ Who are your regular contacts, inside and outside the organization, so we can inform them of the transition?
- ◇ Are there any systems that your successor needs training on?
- ◇ What tasks take priority in your role?

## Exit Interview

Some of the knowledge transfer will occur during the exit interview, especially if it occurs on the last day and the employee is wrapping up final tasks.

Ideally, the person leading the exit interview did not directly supervise the student. This allows the employee to be more open, especially when asked about the quality of supervision and mentorship they received.

Interviews should be brief, approximately 30 minutes to an hour and held on the last day or two of the work placement. Schedule this meeting in advance and provide information on what will be discussed.

The meeting allows time to communicate any final wrap-up tasks. But while hand-over details are important, the real thrust of an exit interview is to gather feedback from the employee about their role, workload, the management's style, and other feedback they may have on the organization, including what and how they think systems could be improved. Let them know that any sensitive information will be kept confidential.

Asking for feedback makes employees feel appreciated, but this is also a good time to offer them feedback as well. Let them know what their strengths are and how they contributed to the organization. And don't forget to allow time for the employee to ask questions too.

Some example questions developed by BambooHR and Colorado State University's Career Center that you can ask during your exit interview include:

- ◇ Were your work goals and responsibilities clear?
- ◇ Did you feel you had all the resources you needed to do your best work here?
- ◇ Would you change the job description for the next person filling this position? If so, how?
- ◇ What did you think of the way you were managed? What could have been done differently?
- ◇ Did you receive frequent, constructive feedback from your manager and peers?
- ◇ What advice would you like to give to your team? To management?
- ◇ What did you appreciate most about working here?
- ◇ What would make this a better place to work?
- ◇ Would you consider working here again?
- ◇ Would you recommend that others apply for a position here?



## Paperwork & Logistics

The sometimes dull but necessary steps to wrap up a work placement:

- ◇ Communicate to all staff about the employee's last day and thank them for their service.
- ◇ Ensure the employee's final paycheque is correct and includes any owed vacation pay, benefits, etc.
- ◇ Issue a Record of Employment and if possible, their T4 or other tax-related forms.
- ◇ Arrange to have the employee return any property that belongs to your organization, such as keys, uniforms, computer equipment, etc.
- ◇ Have the employee set an out-of-office reply directing people to the appropriate staff.
- ◇ Change passwords and remove access to any shared files, databases, software programs, etc.
- ◇ Remove the employee from any future calendar events, internal mailing lists, etc.
- ◇ Connect with their school in case any final evaluations are required.
- ◇ Prepare any reports for funders used for the student's wage subsidy (if applicable).
- ◇ Ensure you have the correct contact information for the employee who is leaving.



## Celebrating

A sure-fire way of making your employee feel appreciated in their final days is to set time aside to celebrate. This can be a social coffee and cake moment after lunch or at the end of the day. Make sure to invite all staff to say good-bye. A card signed by the team or a parting gift is also a great way to express your appreciation.

## Implementing Feedback

Review the feedback your employee gave you. What are some protocols and practices that need adjustment? Does their supervisor need additional support or training before managing the next student? Does the student role need to shift to increase or decrease the workload? Feedback is a gift and an opportunity to better your organization.

## Following Up

While not always necessary, following up can be very useful if you'd like to bring the student back to fill a position. This is what is meant by the "talent pipeline." And even if they are unable to fill that position, following up provides a networking opportunity. Perhaps they know of someone looking for work who might be a good fit. Finally, following up can be helpful if your organization is applying for funding or future wage subsidies. A quote from a former student-employee and the story of their new-found success can show that you are a good employer and mentor, and can help secure funding for your organization.

## Sources:

“6 Exit Interview Best Practices: Tips & Precautions” by BambooHR:

<https://www.bamboohr.com/blog/definitive-guide-exit-interview>

ACE-WIL Professional Development Resources (Post-WIL Experience):

<https://acewilbc.ca/resource-library/ace-wil-professional-development-resources-post-wil-experience/>

“Employee Exit Interview Questions” from Colorado State University Career Center:

<https://career.colostate.edu/employer-resources/exit-interview-questions-for-student-employees/>

“Employee Offboarding Checklist: A Guide to Graceful Exits” by Brian Westfall and Sierra Rogers, Software Advice:

<https://www.softwareadvice.com/resources/employee-offboarding-checklist/>

“Employee Offboarding: What It Is, Why It Matters, And How To Do It Well” published by Ariel Diaz, Blissfully: (Link no longer active.)

“Offboarding: What It Means and Why It Matters” by Brian Anderson, BambooHR:

<https://www.bamboohr.com/blog/offboarding-why-it-matters>

“Off boarding Student Employee Checklist” from Humber College:

<https://careers.humber.ca/docs/faculty/Offboarding-Student-Employee-Checklist.pdf>

