OFF BOARDING POLICY

Introduction: How to Use This Template

Minimize risk by properly managing the exit of an employee. Employee departures may result in the loss of property or key knowledge if they are not handled properly. Well-developed offboarding procedures help mitigate the risks of those transitions by outlining appropriate roles and responsibilities. This policy includes an Offboarding Checklist.

This document provides a structured approach to developing an offboarding policy and includes procedures for the following:

- Transfer of organizational property
- Exit interviews
- Role and knowledge transfer

Use this template to craft a policy that fits your needs.

<table>
<thead>
<tr>
<th>Policy Title</th>
<th>Offboarding Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Owner</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Policy Approver(s)</td>
<td>Vice President of Human Resources</td>
</tr>
<tr>
<td>Related Policies</td>
<td>Name other related enterprise policies both within or external to this policy.</td>
</tr>
<tr>
<td>Related Procedures</td>
<td>Name other related enterprise procedures both within or external to this policy.</td>
</tr>
<tr>
<td>Storage Location</td>
<td>Describe physical or digital location of copies of this policy.</td>
</tr>
</tbody>
</table>
Effective Date | List the date that this policy went into effect.
---|---
Next Review Date | List the date that this policy must undergo review and update.

**Purpose**

[Organization name] strives to recruit and retain the best talent. However, in circumstances where an employee chooses to pursue other opportunities or where [organization name] chooses to end the employment relationship, it is important to ensure the employee’s departure is handled in an organized manner.

This policy governs the offboarding process to ensure a smooth transition for both the departing employee and [organization name].

**Scope**

This policy applies to all [full-time, part-time; insert other groups if necessary] employees who depart [organization name].

**Definitions**

**Offboarding:** The process of effectively transitioning a departing employee and integrating their replacement.

**Procedures and Responsibilities**

Ten steps for offboarding:

1) Receive and accept the resignation or termination

2) Communicate exit to key departments and personnel.
   a. HR/Manager
   b. Security
   c. IT
   d. payroll
   e. Colleagues
3) Transfer Knowledge: provide the departing employee with time and resources to write/record key information and/or speak directly with a new employee to transfer knowledge
4) Recover organization assets
5) Revoke organization privileges and access
6) Update org chart, website and other company information
7) Finalize financial details including any outstanding moneys owed and final payment details
8) Clarify entitlements if any (i.e. pension and benefits)
9) Provide basic reference letter
10) Conduct an exit conversation
11) Thank your employee for the service

[Organization name] Property

Human Resources will coordinate the transfer of all [organization name] property prior to the employee's departure with IT [name other relevant departments]. The departing employee will be responsible for returning all [organization name] property in usable condition. The employee will be held accountable for any damage beyond wear-and-tear unless they can show that the damage was due to factors beyond their control. The cost of repair or replacement for damaged property will be deducted from the employee's final paycheck. For more information, please consult the following policies: [list applicable policies here].

Exit Interview

Employees who depart [organization name] voluntarily will be asked to complete an exit interview. The purpose of the interview is to gain the departing individual’s feedback on their tenure at [organization name] and suggestions for improvements. Exit interviews will be arranged and conducted by Human Resources and will typically take place in the employee’s last week of employment with [organization name].
**Role and Knowledge Transfer**

In situations where the employee's departure is foreseeable (e.g. retirement) and the employee's role is identified as a key role, or the departing employee holds specialized knowledge or skills, the employee, their supervisor, and Human Resources will work together to develop a suitable role and knowledge transfer plan. While the contents of each plan will be specific to the departing employee's circumstances, all plans must include the following elements:

- Role and accountabilities
- Measurable goals
- Knowledge and skills transfer methods
- Timelines for completion

Typically, the implementation of role and knowledge transfer plans will involve participation from the departing employee, their supervisor, and the new incumbent (if known). Common knowledge transfer methods include:

- Job shadowing
- Special assignments
- Mentoring

**Termination**

In the circumstances when an employee has been terminated the offboarding process will include supervised access to a workspace and monitored access to the organization's computer system. All property and equipment will be returned immediately. In some instances terminated employees will be escorted from the premises. Normally this will occur before the workday, during noon hour or at the end of the workday to minimize workplace disruption.

**Employee Declaration**

I, __________________________, hereby acknowledge that I have read and understand [organization name]'s Offboarding Policy. I agree to abide by the terms and conditions of this policy and ensure that persons working under my supervision abide by the terms and conditions of this policy. I understand that if I violate or fail to
comply with this policy, I may face legal or disciplinary action according to applicable laws or [organization name] policies.

______________________________  ________________________________

Employee Signature  Date

______________________________  ________________________________

Manager Signature  Date

Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Change</th>
<th>Author</th>
<th>Date of Change</th>
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<tbody>
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</tbody>
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______________________________
SAMPLE EMPLOYEE OFFBOARDING CHECKLIST

<table>
<thead>
<tr>
<th>First Name:</th>
<th>ID Number</th>
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<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Last Name:</th>
<th>User ID:</th>
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<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Position Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Last Day</th>
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<td></td>
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</table>

Please initiate this form once an employee has submitted a letter of resignation or is involuntarily terminated.

- Must be submitted ASAP (within 2 business days of receiving resignation letter)

**Supervisor Checklist**

<table>
<thead>
<tr>
<th>Yes</th>
<th>N/A</th>
</tr>
</thead>
</table>

- [ ] Collect resignation letter from employee
- [ ] Send copy of resignation letter to Manager
- [ ] Send original resignation letter to HR
- [ ] Inform employee Benefits department will send separation benefit information
- [ ] If employee is terminated involuntarily, ensure all systems are removed immediately
☐ ☐ Exit FAQ list
☐ ☐ Contact security personnel and inform to remove of all employee access to systems
☐ ☐ Notify Information Technology Services

☐ ☐ Items to be collected:
☐ ☐ Keys/Swipe card/Security card
☐ ☐ ID Card
☐ ☐ Uniform
☐ ☐ Communication Equipment
☐ ☐ Computer Equipment
☐ ☐ Travel & Entertainment Card and P-Card (from Employee)

__________________________________________
Supervisor Signature

__________________________________________
Date
### Employee Checklist

<table>
<thead>
<tr>
<th>Yes</th>
<th>N/A</th>
</tr>
</thead>
</table>
| ☐   | ☐   | I have returned my parking tag to Parking and Card Services
| ☐   | ☐   | I have verified that my permanent address is correct
| ☐   | ☐   | I have saved my employee ID and password, if required to access employee records
| ☐   | ☐   | Complete HR Exit Survey/Interview
| ☐   | ☐   | Necessary documents should be placed in a secure area for incoming replacement/and or supervisor (electronic or paper)
| ☐   | ☐   | Make arrangements with manager to move business related information to a shared company location
| ☐   | ☐   | Change outgoing phone message
| ☐   | ☐   | Provide voicemail pin code to supervisor
| ☐   | ☐   | Remove all personal items from office/work area
| ☐   | ☐   | Complete summary of ongoing projects and status to supervisor
| ☐   | ☐   | I have outstanding travel advances

**Items to be returned to Supervisor:**
- ☐ ☐ Keys/Key cards
- ☐ ☐ Uniform
- ☐ ☐ Communication Equipment:
- ☐ ☐ Computer Equipment: Laptop, Tablet, & other misc equipment
- ☐ ☐ Travel & Entertainment Card
- ☐ ☐ _______

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**Employee Signature**

**Date**

**Please email/fax completed checklist to Human Resources at**

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