Offboarding handbook for the members of governance and other key groups in Open Life Science

This is an adaptation of an original work by the International Labour Office (ILO). Responsibility for the views and opinions expressed in the adaptation rests solely with the author or authors of the adaptation and are not endorsed by the ILO.

See the original work: <u>Onboarding handbook for board members of small employer and business membership organizations</u>, draft Copyright © of International Labour Organization 2021 First published 2021, shared under CC-BY 4.0 License

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Offboarding by Week

Offboarding is the process that leads to the formal separation between a board member and the organisation through resignation, termination or retirement. Offboarding ensures there are no communication gaps or information loss when a board member leaves the organisation. The process is also important to ensure that the contributions by the board members are fairly recorded and attributed in the future, as well as to improve the ways of working for the current and future employees.

Week 1

Week 1 is the first week after you have either finished your defined term as a key member or stepped down from your position to serve as a key member. It is expected that a written communication via personal email between you and a core team member (primary contact) has occurred before the offboarding begins.

- ☐ Please schedule an exit interview with a core member
- ☐ The key member will document their responsibilities in a shared folder/document that can accessed by the active board members and the core team
- ☐ The key member can help delegate the task they have previously undertaken to ensure continuity.
- ☐ In case they are finishing some work that won't be carried forward, key members will create a report of what has been done and what outcomes were achieved. This can be done via a document, or if necessary, via video or voice recording too.
- ☐ The key member will return any equipment or physical documents addressed to the organisation to a core team member

Updating the internal governance document and website

- ☐ The core team members will update the internal governance document by updating your details from 'current' to 'former' board member
- ☐ Please share a contact detail (email) if you wish to be contacted by the organisation in the future
- ☐ If you wish to be contacted about specific work, or do not wish to be contacted, please communicate that with the primary contact from the core team

For the website, your info will be updated:
- ☐ your details from 'current' to 'former' board member
- ☐ updated short bio
- ☐ a profile image (optional)

We will reuse the information supplied by you in the Declaration of Participation form. To update any details, please email team@openlifesci.org.

Week 2

Checklist to remove access

- ☐ Mailing lists
- ☐ Shared Google Drive and all files
- ☐ Shared calendar
- ☐ Keybase
- ☐ Private Github repositories
- ☐ Slack private channels for key members
    - ☐ You should still have access to the general workspace (if you wish to stay connected)
    - ☐ You can use Slack direct messaging if you need a quick reply for an informal question.
    - ☐ Please send an email to formally record and share any conversation that all core team members should be aware of.
- ☐ Please declare if you hold any password to the organisation's subscription or account to any service. Please transfer access to the core team member, who will update the password to maintain future access by the active board members and/or core team.

Week 3

Exit interview

An exit interview provides an opportunity for the organisation to seek feedback about an employee's experience. Gathering feedback can help organisations identify areas for improvement and reduce future turnover. (Source: Offboarding: What It Means and Why It Matters - BambooHR Blog.https://www.bamboohr.com/blog/offboarding-why-it-matters*)*

- ☐ Conduct an exit interview with one of the OLS Core Team members (for tips and questions see *Offboarding: What It Means and Why It Matters - BambooHR Blog*. and Best Exit Interview Questions - BambooHR)
- ☐ This will mark the End of Term for you, but we invite you share anonymous feedback via this form (accessible by the OLS team members): https://forms.gle/1Gxk5rurKbnew4N67.

Thank you so much for your support, service and advisory roles in OLS!