

Executive Leadership
Forum

**Grace and Grit
When Offboarding
Employees:
the C- Suite
Responsibility**

June,3, 2021
9:00 - 10:30 am (CDT)

WEBINAR



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Hosts & CPI Partners



Barbara A. F. Greene
CEO & Founder of Greene and Associates, Inc.



Phil Walker – Managing Partner at
Career Partners International Austin

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A Career Partners International Firm

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Executive Leadership Forum



Help companies pivot



Honor non-profit



Create resilient leaders



Complimentary quarterly sessions



Learn from each other

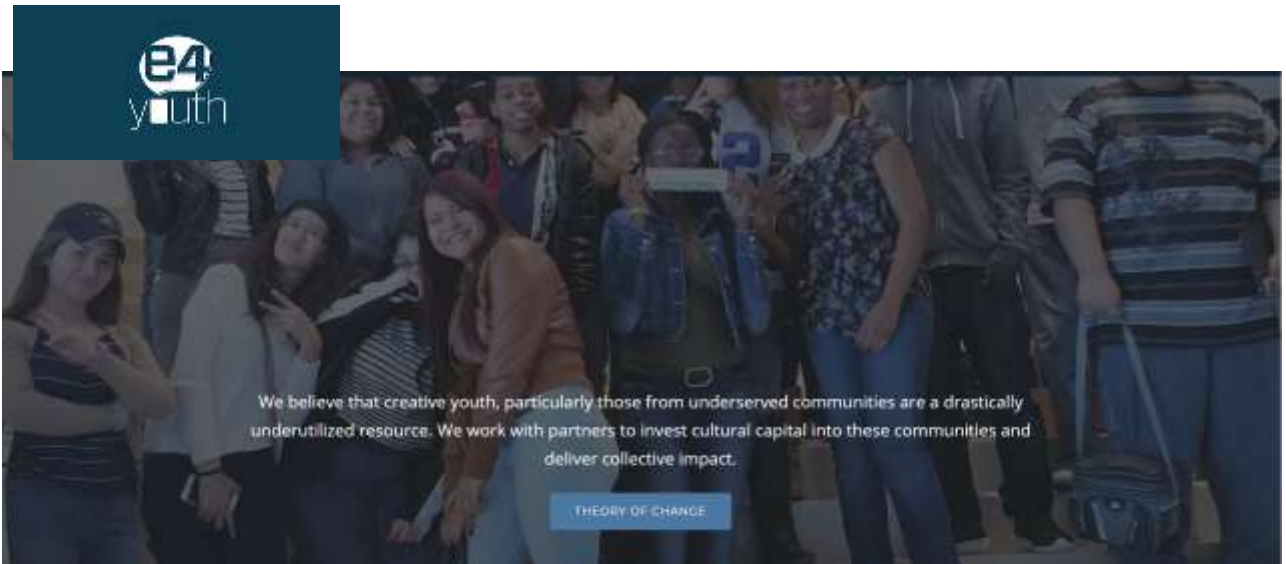


Connect with other leaders

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<https://e4youth.org/>

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Today's Focus

- Honor and support those being offboarded
- Live up to corporate values during offboarding
- Leave exiting people with positive feelings
- How exiting leaders can leave the culture strong

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John F. Barnes IV, MBA, SPHR
Vice President of Human Resources and Learning, BioBridge Global



John is the Vice President of Human Resources and Learning, BioBridge Global in San Antonio, Texas. Prior to his work with BioBridge Global, he held senior management positions in operations and human resources at several firms including Texas Biomedical Research Institute, Accenture and ILEX Oncology, Inc., a publicly held cancer drug development company until its acquisition in 2004. He is also a software designer and developer. In the course of his work, he has filed two software application patents. John is a member of several professional organizations and academic honor societies and has held numerous volunteer leadership positions with national and local organizations. Throughout his career he has partnered with the C-Suite in a variety of Offboarding initiatives.

John earned an Associate of Arts degree from New Mexico Military Institute, a Bachelor of Business Administration degree from New Mexico State University, and a Master of Business Administration degree from Our Lady of the Lake University in San Antonio.

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Amy Hartman
Credit Human Federal Credit Union, Senior Manager, Human Investments

Credit Human envisions communities free from financial stress; our team members enact Credit Human's Mission to help people create and maintain financial slack. Amy Hartman serves 800 Credit Human team members and Managers, shaping Credit Human's employment value proposition and actualizing Credit Human's learning and developmental framework. Throughout Amy's career at Credit Human, she has collaborated and partnered with the C-Suite to initiate and implement culture shaping that impacts each associate's onboarding to their off boarding while integrating the organizations core values.



Amy's vocational journey over the past 30 years is rooted in building community: organizing people towards civic engagement, enabling access to medical care and basic needs for people who are homeless, leading nonprofit organizations, creating access to affordable housing, managing, and developing people and organizations. Her leadership focus is to engage people in growing self-awareness, claiming shared values, defining problems, finding root cause, identifying strengths, and working collaboratively to build systems that bring solutions to life. Amy's partner, family and friends, her faith, learning, hiking, folk dancing, hospitality, acoustic music, and finding her developmental blind spots – this is what keeps life worth living for Amy.

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Amy Hartman

Senior Manager, Human Investments



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Living Values



Our Vision
Communities free of financial stress.

Our Mission
Help people create and maintain financial stock.

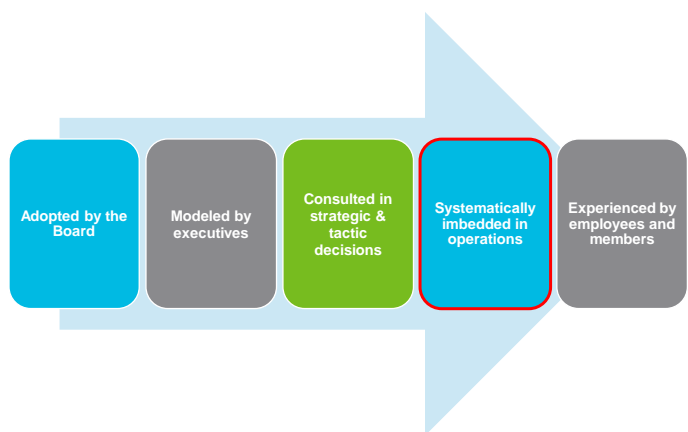
Our Values

Improving Quality of Life
We invest our resources to empower people in all aspects of life to make informed financial decisions that build a better future. We integrate the well-being of our employees and communities with the sustainability of our Mission.

Dignity through Diversity
We are proud and believe in a team that brings different perspectives to our work. We create an inclusive and respectful culture to successfully navigate our financial challenges. We continue to evolve as the market in help each person develop their financial stock.

Collaborating and Learning
We promote and build a culture of innovation for high-quality investment based on individual capabilities, interdependence, and mutual accountability. We learn and create useful insights to address the financial needs of our clients.

Steadfast in Purpose
We are true to our Vision, Mission, and Values in the face of adversity, risk, and uncertainty.

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Brand Behaviors



HUMAN DIGNITY

The state or quality of being worthy of honor or respect.

STEWARDSHIP

The careful and responsible management of something entrusted to one's care.

HUMAN DIGNITY

- Treating another person with such respect that it affirmed that other person's sense of worth and value
- Being present to another person and their situation, recognizing that the other person's needs and interests are at the center of the interaction
- Seeking to understand the other person and their mindset, recognizing and experiencing the other person's feelings and state of being so as to enhance the quality of listening by you, hearing the other person's unexpressed thoughts & feelings
- Undertaking a dialog that is honest and straight-forward, respectful and courteous even though the individuals may be disagreeing
- Being true to the one's self in that interaction, being aware of your strengths and limitations, and in so doing being able to act independently and cooperatively with others
- Striving to be consistent in terms of what is thought internally and said externally (congruence)

STEWARDSHIP

- Fostering an environment of sound caretaking and forethought, designing & executing work in the best possible and least wasteful way, improving quality, customer service and profitability
- Appropriately using financial and human resources, resulting in sustainable, stronger collective or entity
- Orienting corporate culture so as to reinforce and support mutual accountability and other key principles that we have committed to as a company
- Executing long-term planning while considering current needs
- Responsibly deciding, soundly managing, and competitively positioning so as to accomplish success while establishing a firm foundation for the future

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Systems Bridge



- Ongoing career development for all employees.
- Ongoing employee financial wellness.
- Involvement of Manager accountable for the talent pool with all exits.
- Maximum possible time and choice.
- Career transition services.

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John F. Barnes IV, MBA, SPHR

Vice President of Human Resources and Learning, BioBridge Global



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BioBridge Global's Values



ASPIRE definitions

- **Accountability:** Do our part to achieve BBG's growth and success
- **Stewardship:** Serve others selflessly and responsibly
- **Pioneer:** Create and deliver innovative products and services
- **Integrity:** Build unity and trust by doing the right thing
- **Respect:** Treat all with dignity and kindness
- **Excellence:** Surpass team, customer, and community expectations

We are **stewards** of the gifts our donors provide us. At the same time, we are **accountable** for the actions we take that adversely affect the lives of others. When the need arises to reorganize, we act with **integrity** and **respect** for those impacted as a result of very difficult decisions.

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Last Impressions Count The Importance of Offboarding

- Provides assurances to those who remain employed that the leadership cares about those who have been impacted by a reduction
- Provides a bridge to another employer
- Maintains connections between current employees and those who have exited the organization
- Reduces potential legal ramifications
- Mitigates security risks (company assets, account access)
- Preserves the employer's brand

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Begin with a Plan

- Compassion - consider the process from the perspective of those affected
- Communication pre-event
- Confidentiality
- HR leadership
- Legal – WARN Act (as applicable), adverse impact analysis, severance agreements
- Management training
- Logistics preparation
 - Place, day, time, packing of personal effects, company property, etc.
- Schedule group meetings and provide invitations (optional)
- Scheduling manager and HR professional
- Communication post event

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The Day of...

- Personalized packets/binders
- Group meetings when applicable
 - Lead by senior leader(s)
 - Accompany employee to workspace
- 1x2 meetings when practical
 - Led by individual's manager with HR rep present
 - Meet with employee in workspace
- HR reviews material with employee
- Assist in packing or arrange for another day/time
- Ensure security is aware and on-duty
- Outplacement counselor access
- Communication from executive leadership at end of day

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Post Event

- Levels of outplacement
 - Group
 - Small group
 - 1x1
- Orientation
 - Intro to the program and expectations
- Career coaching
- Resources
 - Career/leadership assessments
 - On-line and books
 - Resume preparation and interviewing skills
- Connection opportunities

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4 C's to Offboarding the Right Way

CHANGE**COMMUNICATION****COURAGE****COMPASSION**

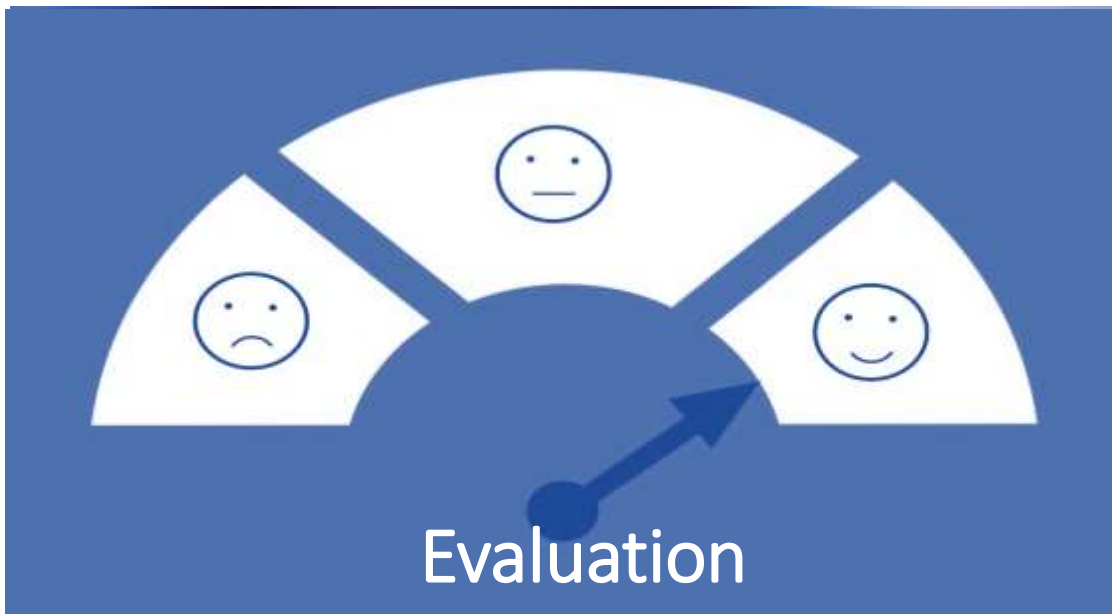
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Questions

*Raise Hand/Unmute
Chat*



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Executive Leadership Forums 2021

C-Suite Partnering with Board Members = Dynamic Success

Thursday, **Sept. 2**

9:00-10:30 a.m. CST

<https://tinyurl.com/yt9u8eah>

TBD

Thursday, **Dec. 2**

9:00-10:30 a.m. CST

<https://tinyurl.com/fzsd4rv5>

SAVE THE DATE

**COMING
UP**

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Upcoming Programs

Leveraging Mentors and Sponsors

June 15, 2021

9:00 – 10:00 a.m. CDT

<https://tinyurl.com/2yv4dc58>

Dahlia Rigsby, VP Vericast (formerly Harland Clarke)

Teambuilding

July 20, 2021

9:00 – 10:00 a.m. CDT

<https://tinyurl.com/sru77cn8>

Featuring Mike Bryant – HEB Executive

**REGISTER
NOW >>**

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WEBINAR



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Barbara A. F. Greene is the Founder and CEO of Greene and Associates, Inc. She leads the company as the team partners with organizations globally as an equity partner in Career Partners International. Organizations engage Barbara and her team in providing executive coaching, leadership development, corporate mentoring, and career transition and management services. Barbara earned a master's degree, is an International Coach Federation Master Certified Coach, and a Marshall Goldsmith Stakeholder Centered Certified Coach.

She is involved in the community. Being selected to serve on the LSA 300 Steering Committee was a huge honor in the tricentennial year for San Antonio. She has been involved in the Texas Diversity Council, Association of Talent Development, CFO Forum, THRU Project, International Coaching Federation, San Antonio Lighthouse for the Blind and Visually Impaired, City Year, United Way Master Leadership Program, BioMed SA and San Antonio Council for International Visitors. Barbara has hosted people from around the globe in her home. At any one time, her guests represented 14 different countries.

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Greene and Associates Inc. Services

Executive Coaching

Leadership Development

PowerAmp™ Coaching

Onboarding

Corporate Mentoring

Career Transitioning

Career Management

Customized Training Programs

DE&I Programs

Leader As Coach Certificate Program

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Phil Walker is the Managing Partner for Career Partners International - Austin, a global human capital management strategy firm. He leads a team of talent experts that enable their corporate clients to drive sustainable business results by effectively aligning their people strategies to their current and future needs. Phil has worked and consulted for a number of major corporations including Xerox, Steelcase, Haworth, and Right Management. As a successful entrepreneur, Phil has started and been Managing Principal for the Walker Group, Alliance Capital Group and W2 Group. He has established businesses to help small and mid-sized organizations achieve their business objectives by providing market and business development consulting services that translate strategic plans into measurable tactical initiatives.

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Grace and Grit When Offboarding Grace and Grit When Offboarding Employees - the C- Suite Responsibility

The idea of an organization making a great first impression, setting the stage for the entirety of a prospective employee's tenure, is critically important. But what if the impact an organization makes when an employee departs was just as powerful? A Harvard Business Review article recently stated, "Organizations spend a great deal of time and resources bringing new hires aboard and retaining employees, but very little effort and few resources go toward offboarding". Offboarding is the last opportunity your organization has to show employees value. Offboarded employees can be our best advertisement or our greatest detractors. How they perceive your company, especially in their final days, will be shared with their friends, family and even strangers on the internet. In addition, the way an organization treats exiting workers is watched by other employees.

In this Executive Leadership Forum, we will hear from companies who "did it right" – honoring and supporting those being offboarded, while living up to their corporate values. We will discuss the planning process, how offboarding is more than just compliance, risk mitigation and implementing exits in a manner that results in people looking back at their tenure with positive feelings rather than devastation. Additionally, we will explore what C-Suite leaders should do the year before they exit their position in order to leave the company while keeping the culture strong and moving forward.