

UC San Diego

CENTER FOR OPERATIONAL EXCELLENCE

LEAN, LUNCH & LEARN WORKSHOP

“Exit Interview Process & Data”

MAY 23, 2023

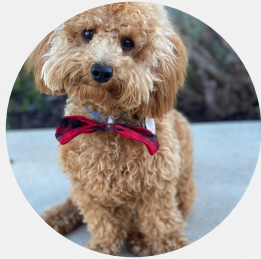


Our Sponsor:

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CENTER FOR OPERATIONAL EXCELLENCE



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THE "TEAM"



COE WEBSITE
L3 Workshops

Lean, Lunch & Learn Workshops

Lean, Lunch & Learn (L3) Workshops featuring a discussion on a best practice in Academic Affairs. The Best Practices group, composed of Academic Affairs Assistant Deans, will prioritize topics for the L3. The goal is to come up with a best practice by the end of each L3 workshop.

Submit your idea for an L3 Workshop - send us an [email](#).

Next L3 Workshop

Topic: **Campus Documentation Best Practices**

When: **October 14, 2022, 11:00 a.m. - 11:45 a.m.**

Recent changes have brought about the need to produce and locate instructions FAQs KBAs tips and policies. Come hear about the latest guidance from Campus Platform Technologies and share your best practices in deciding when to use Blink Collab ServiceNow KBAs or other sources.

Join us for this information workshop on your documentation needs - What goes where?

[REGISTER](#)

Previous L3 Workshops

[+ Expand All](#)

- ▶ SEP 2022: Staff Team Building
- ▶ AUG 2022: Fiscal Reporting - Overview & Updates
- ▶ JUL 2022: Resources to Train HR Contacts
- ▶ FEB 2022: Student Employee Onboarding Checklist

[+ Expand All](#)



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SURVEY ABOUT YOUR EXIT SURVEYS

Scope for Today

- Survey process & data
- Timeline between
 - HR notified of exit
 - Data received
- Survey needs
- Survey pros & cons

EXIT INTERVIEW PROCESS

Notify
HR of
Exit

Local
HR
Actions

Request
HR
Survey

Process
& Send
Link

Survey
Results

Change in Employment Status

Employee Checklist

Death

Retirement

Separation

Termination

Layoff/Reduction in Time

Departments

Human Resources

See also

Personnel policies

When an Employee Separates from UCSD: Department Checklist

Last Updated: July 13, 2022 2:48:46 PM PDT

Give [feedback](#)

HR Contacts and Supervisors, use this checklist to determine the steps to take when an employee submits a notice of separation.

For information about employee termination, contact your [employee relations](#) and [labor relations](#) specialists.

– [Collapse All](#)

▶ Supervisor - Check with your department's HR contact.

▶ HR Contact - Process the separation through UCPATH Online.

▼ HR Contact - Complete all necessary forms.

- Request an Exit Survey.
 - Verify with the employee the preferred email address to receive the invitation.
 - Submit a [request](#).

EXIT INTERVIEW PARTNERS

Employee

Unit/Dept

HR

Supervisor

School

Tritonlytics

VC

Privacy

ER

TOPICS IN MOTION

Adjust Campus Survey

- Inclusive
- Singular
- Consistent

Distribution Process

- Single link
- Local distribution
- Chat options

Data Process

- Who, when, how
- Timely issues
- Anonymity

FEEDBACK WORKSHOP

1) What are Pros & Cons: Unit vs. Campus?

Unit/Dept Survey: Pro

Unit/Dept Survey: Con

Campus/Central Survey: Pro

Campus/Central Survey: Con

FEEDBACK WORKSHOP

2) What information do you want from survey results?

Supervision/ Leadership

Colleagues/Staffing

Work Process/Tasks

Unit/Campus

Other



THANKS!
Any questions?

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“Documentation for High Risk Transactions”

JUNE 20, 2023

The High Risk Ledger Review provides a mechanism for departments to select transactions for periodic review. This is an acceptable alternative to reviewing 100% of transactions, but how should you be documenting your review? Join us for this workshop where we will be discussing what your review documentation should include for the various types of high-risk transactions.



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