



# Staff Exit Procedure

Policy created: 04/2011

Policy reviewed and updated: 06/2015

Scheduled date of next review:

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## Update Information

This model policy will be subject to ongoing review and may be amended prior to the scheduled date of the next review in order to reflect changes in legislation, statutory guidance, or best practice (where appropriate).

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## 1. Scope

This Procedure applies to all employees employed by schools and academies leaving employment through voluntary resignation.

It does not apply to employees whose exit from the school is through their contract of employment being terminated by reason of dismissal for misconduct/gross misconduct, ill health, capability, redundancy or where the employee is retiring.

For academies, all reference to the Headteacher should, where appropriate, be replaced with Principal/Head of School, and all reference to the Governing Body should, where appropriate, be replaced with the Academy Trust, and all reference to school should, where appropriate, be replaced by school.

The recognised trade unions have been consulted.

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## 2. Purpose

The purpose of this policy is to provide a clear process for managing employees leaving the school.

An Exit Interview is a key aspect of the recruitment cycle, as it enables the school to elicit information to feed into the recruitment and selection process as well as consideration of retention issues.

The administration of the leaver process must be given priority in order to avoid salary overpayments.

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## 3. Procedure

The procedure involves the Headteacher/Line Manager carrying out an Exit Interview with the leaving employee. Where an employee does not wish to undertake an Exit Interview they can be given an Exit Questionnaire to complete.

### 3.1 The Exit Interview

The key aims of an Exit Interview are:

- To elicit honest feedback about the employee's perceptions of management systems and behaviours
- To assess the effectiveness of team working amongst the employee's work group
- To assess the general state of morale in the employee's work group
- To assess whether lack of training and career opportunities or other factors are resulting in loss of good employees
- To determine whether the employee is leaving with positive feelings about the school or with unresolved concerns.

Whether the feedback gained from the Exit Interview is positive or negative, a good organisation will use the information as an investment into the process of continuous improvement.

All staff should be offered the opportunity to discuss their reasons for leaving through an Exit Interview with their line manager but have the right to decline the offer. Where the line manager/employee relationship is uncomfortable, the exit interview can be carried out by another manager at the school.

The line manager should arrange an Exit Interview as soon as possible after receiving the resignation taking account of the last working day/last day of service.

The employee should be given reasonable notice, depending on the leaving date, of the Exit Interview. Taking into account the time scales involved, between 2 and 5 calendar days would be considered reasonable. The Exit Interview should be carried out during the employee's working time.

An Exit Interview is an investigative discussion between a manager and employee.

The Exit Interview should be held in a relaxed atmosphere and should be conducted in a way that encourages the employee to be open and honest. The Exit Interview Form (Appendix 1) provides the framework for the discussion and the employee's responses should be recorded. Once completed, the Exit Interview Form should be returned to the Chair of the Staffing /Personnel Committee.

Where it is obvious that the employee is leaving or transferring for positive reasons, and with positive feelings, the manager should use the Exit Interview as an opportunity to reinforce those feelings so that the employee will be a good ambassador of the school. It is also an opportunity to ascertain what aspects of the school policy and practice have contributed most to the employee's sense of well-being and success.

It is important to explore fully any negative or anxious feelings. If the manager believes that the employee is disguising or withholding some negative feelings, these should be probed gently to get a true picture. In exceptional circumstances, the employee may have justifiable concerns (e.g., sexual harassment or bullying), which is later raised in a claim of constructive dismissal. In such exceptional circumstances, it may be advisable for the manager to encourage the employee to remain in employment. In any event, the manager should investigate and, if there is substance, should deal with the identified cause of the concern. Schools HR should be consulted for advice.

The manager should make a note of the key issues and feelings discussed in the Exit Interview. These notes could be particularly important if there is subsequent legal challenge resulting from an unresolved grievance (e.g., a claim of constructive dismissal). The Exit Interview Form with the employee's responses should be kept in a confidential central file for monitoring purposes.

The feedback obtained during Exit Interviews is one of the most important sources of information available for the continuous improvement of performance and morale within an organisation. Positive feedback from an Exit Interview can reinforce confidence in management styles and effectiveness of the service. Conversely, honest feedback can be helpful to the service or individual managers to reflect on whether the management style is too constraining, unsupportive, or otherwise failing to achieve optimum commitment and performance. If any suggestions are made that could improve

the service, these should be raised at, if appropriate, Governing Body level.

If an Exit Interview demonstrates that an employee has a negative perception of the school's policies or practices it is possible that other employees may share that perception. Armed with such knowledge the school can create better awareness and promote positive thinking.

An Exit Interview is not simply an end in itself. It is a re-enforcer of good practice and a means of achieving improvement in managerial competence and organisational effectiveness.

Managers should remember that the information given should be treated in confidence. If the employee discussed an issue, which has implications for the school, the manager should advise the employee that they may need to disclose the information to other appropriate people.

### **3.2 The Exit Questionnaire**

Where an employee does not wish to participate in an Exit Interview, or where an Exit Interview has not taken place due to other reasons, the manager should ensure that the employee is given an Exit Questionnaire (Appendix 2) to complete and return to the Chair of the Staffing/Personnel Committee.

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## **4. Monitoring**

It is important that the school puts in place measures to monitor the responses and identify any trends which affect the school's recruitment and retention strategies.

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## 5. Appendix 1 - Exit Interview Form

### EXIT INTERVIEW FORM

To be completed by the Line Manager for all voluntary leavers

School:		
Name of employee:		
Post:		
Name of employee's Line Manager:		
Name of Manager conducting the Exit Interview:		
REASONS FOR LEAVING		
Please enter the main reason for leaving given by the employee by ticking only one box		
<input type="checkbox"/> Move to a higher paid job <input type="checkbox"/> Change of career <input type="checkbox"/> Level of pay <input type="checkbox"/> Lack of development or career opportunities <input type="checkbox"/> To have/look after children <input type="checkbox"/> To look after family members <input type="checkbox"/> Perception of job security <input type="checkbox"/> Threatening environment (clients/pupils/parents) <input type="checkbox"/> Harassment/Bullying	<input type="checkbox"/> Level of workload <input type="checkbox"/> Level of working hours <input type="checkbox"/> Lack of support from line manager(s) <input type="checkbox"/> Lack of support from colleagues <input type="checkbox"/> Stress of job/role <input type="checkbox"/> Ill health <input type="checkbox"/> Other work reason (please state) <input type="checkbox"/> Other non-work reason (please state)	
WORK FACTORS		
Please enter the employee's response to the questions below and add any relevant comments		
Question	Answer	Employee comments
Were you satisfied with your job?	Yes/No	
If not, was the job as you expected it to be when you first commenced this role?	Yes/No	
Did you find the job sufficiently varied, interesting and rewarding?	Yes/No	
Do you think the rate of pay was right for the job?	Yes/No	
During your employment in this role, were any significant changes made to your job?	Yes/No	
Were you fully consulted about the changes?	Yes/No	
If no, did these changes influence your decision to leave?	Yes/No	
RELATIONSHIPS		
Were you satisfied with your working relationships at the school?	Yes/No	
On reflection, do you think you were well managed?	Yes/No	
Did you have any concerns regarding bullying, harassment or discrimination?	Yes/No	
Did you have any problems with your colleagues?	Yes/No	

<b>PHYSICAL WORKING ENVIRONMENT</b>		
Were you happy with your physical working environment?	Yes/No	
Was the temperature within tolerable limits on most days?	Yes/No	
Was your physical working environment clean?	Yes/No	
Was noise a problem in your work area?	Yes/No	
Were you concerned about any health and safety issues?	Yes/No	
<b>TRAINING AND DEVELOPMENT</b>		
Were you happy with the career opportunities available to you?	Yes/No	
Were you satisfied with the training and development opportunities available?	Yes/No	
Would a career progression scheme have persuaded you not to leave?	Yes/No	
Do you believe that a job might have become available for you on promotion in a reasonable period of time?	Yes/No	
Were you satisfied with the benefits and conditions of service available to you?	Yes/No	
Was a lack of flexible working arrangements one of the reasons for your leaving?	Yes/No	
<b>ANY OTHER COMMENTS</b>		
Please enter other comments made by the employee not covered above		
<b>MANAGER'S COMMENTS</b>		

EQUAL OPPORTUNITIES INFORMATION						
Please complete this information in consultation with employee						
Ethnicity	Tick	Ethnicity	Tick	Disability	Tick	
<b>Asian/Asian British</b>		<b>European</b>		Does the employee consider that they have a disability?		
Indian		Albanian				
Pakistani		Kosovan				Yes
Bangladeshi		Romanian				No
Other		Other				
		<b>Mixed Heritage</b>				
<b>White</b>		Black Caribbean and White				
British		Black African and White				
Irish		Asian and White				
Other		Other				
<b>Black/Black British</b>		<b>Chinese/Chinese British</b>				
Caribbean		Chinese				
African		Other				
Somalian						
Other						

Signed \_\_\_\_\_ Date \_\_\_\_\_  
Employee

Signed \_\_\_\_\_ Date \_\_\_\_\_  
Manager

## 6. Appendix 2 - Exit Questionnaire

### EXIT QUESTIONNAIRE

To be completed by an employee where they do not wish to undertake an Exit Interview

School:		
Name of employee:		
Post:		
Name of employee's Line Manager:		
REASON FOR LEAVING		
Please enter the main reason why you are leaving your employment. Please tick only one box.		
<input type="checkbox"/> Move to a higher paid job <input type="checkbox"/> Change of career <input type="checkbox"/> Level of pay <input type="checkbox"/> Lack of development or career opportunities <input type="checkbox"/> To have/look after children <input type="checkbox"/> To look after family members <input type="checkbox"/> Perception of job security <input type="checkbox"/> Threatening environment (clients/pupils/parents) <input type="checkbox"/> Harassment/Bullying	<input type="checkbox"/> Level of workload <input type="checkbox"/> Level of working hours <input type="checkbox"/> Lack of support from line manager(s) <input type="checkbox"/> Lack of support from colleagues <input type="checkbox"/> Stress of job/role <input type="checkbox"/> Ill health <input type="checkbox"/> Other work reason (please state) <input type="checkbox"/> Other non-work reason (please state)	
WORK FACTORS		
Question	Answer	Employee comments
Were you satisfied with your job?	Yes/No	
If not, was the job as you expected it to be when you first commenced this role?	Yes/No	
Did you find the job sufficiently varied, interesting and rewarding?	Yes/No	
Do you think the rate of pay was right for the job?	Yes/No	
During your employment in this role, were any significant changes made to your job?	Yes/No	
If so, did these changes influence your decision to leave?	Yes/No	
RELATIONSHIPS		
Were you satisfied with your working relationships at the school?	Yes/No	
On reflection, do you think you were well managed?	Yes/No	
Did you have any concerns regarding bullying, harassment or discrimination?	Yes/No	
Did you have any problems with your colleagues?	Yes/No	

<b>PHYSICAL WORKING ENVIRONMENT</b>		
Were you happy with your physical working environment?	Yes/No	
Was the temperature within tolerable limits on most days?	Yes/No	
Was your physical working environment clean?	Yes/No	
Was noise a problem in your work area?	Yes/No	
Were you concerned about any health and safety issues?	Yes/No	
<b>TRAINING AND DEVELOPMENT</b>		
Were you happy with the career opportunities available to you?	Yes/No	
Were you satisfied with the training and development opportunities available?	Yes/No	
Would a career progression scheme have persuaded you not to leave?	Yes/No	
Do you believe that a job might have become available for you on promotion in a reasonable period of time?	Yes/No	
Were you satisfied with the benefits and conditions of service available to you?	Yes/No	
Was a lack of flexible working arrangements one of the reasons for your leaving?	Yes/No	
<b>ANY OTHER COMMENTS</b>		
Please enter any other comments that you may wish to make		

EQUAL OPPORTUNITIES INFORMATION					
Ethnicity	Tick	Ethnicity	Tick	Disability	Tick
<b><u>Asian/Asian British</u></b>		<b><u>European</u></b>		Does you consider that you have a disability?	
Indian		Albanian			
Pakistani		Kosovan			Yes
Bangladeshi		Romanian			No
Other		Other			
		<b><u>Mixed Heritage</u></b>			
<b><u>White</u></b>		Black Caribbean and White			
British		Black African and White			
Irish		Asian and White			
Other		Other			
<b><u>Black/Black British</u></b>		<b><u>Chinese/Chinese British</u></b>			
Caribbean		Chinese			
African		Other			
Somalian					
Other					

Signed \_\_\_\_\_ Date \_\_\_\_\_  
Employee

Thank you for completing the Exit Questionnaire. Please return it to the school for the attention of the Chair of the Staffing/Personnel Committee.

Policy created: 04/2011