



# Staff Exit Procedure

Policy created: 04/2011

Policy reviewed and updated: 10/2023

Scheduled date of next review: 10/2025

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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.

Within this guidance, references to the School, Headteacher, Governing Board and the Chair of Governors will, for Academies and Academy Trusts, be taken to mean a reference to the appropriate equivalent within those establishments.

The recognised trade unions have been consulted.

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## 2. Policy 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 (see [Appendix 1](#)). Where an employee does not wish to undertake an Exit Interview they can be given an Exit Questionnaire to complete (see [Appendices 2 and 3](#)).

### 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 or where it is the employee's preference to have the Exit Interview with another member of staff, the interview should be carried out by another appropriate manager at the school.

The line manager should arrange an Exit Interview as soon as possible after receiving an employee's 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 (see [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 apparent 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.

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 Board 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.

The Exit Interview Form with the employee's responses should be kept in a confidential central file for monitoring purposes and in compliance with data protection principles.

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 (see [Appendices 2 and 3](#)).

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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

### CONFIDENTIAL - 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/Discrimination	<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	

PHYSICAL WORKING ENVIRONMENT		
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	
TRAINING AND DEVELOPMENT		
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	
ANY OTHER COMMENTS		
Please enter other comments made by the employee not covered above		
MANAGER'S COMMENTS		

**EQUALITY AND DIVERSITY MONITORING FORM**

The school is committed to equality and diversity; this includes not discriminating under the Equality Act 2010. To support the school in this commitment and to enable it to build an accurate picture of the make-up of its workforce and those leaving the workforce, it encourages all staff who are leaving, to co-operate by completing this form as fully as possible. **NB: Filling in this part of the form is voluntary. If completed this form will be detached and entered in an anonymised format.**

Gender (Please tick the appropriate box)

<input type="checkbox"/> Man	<input type="checkbox"/> Woman	<input type="checkbox"/> Intersex	<input type="checkbox"/> Non-Binary	<input type="checkbox"/> Prefer not to say
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If you prefer to use your own term, please specify here:

Are you married or in a civil partnership? (Please tick the appropriate box)

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Prefer not to say
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Age Band (Please tick the appropriate box)

<input type="checkbox"/> 16-24	<input type="checkbox"/> 25-29	<input type="checkbox"/> 30-34	<input type="checkbox"/> 35-39	<input type="checkbox"/> 40-44
<input type="checkbox"/> 45-49	<input type="checkbox"/> 50-54	<input type="checkbox"/> 55-59	<input type="checkbox"/> 60-64	<input type="checkbox"/> 65+
<input type="checkbox"/> Prefer not to say				

What is your ethnicity?

*Ethnic origin is not about nationality, place of birth or citizenship. It is about the group to which you perceive you belong.* (Please tick the appropriate box)

White

English	<input type="checkbox"/>
Welsh	<input type="checkbox"/>
Scottish	<input type="checkbox"/>
Northern Irish	<input type="checkbox"/>
Irish	<input type="checkbox"/>
British	<input type="checkbox"/>
Gypsy or Irish Traveller	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

Any other white background, please write in:

Mixed/multiple ethnic groups

White and Black Caribbean	<input type="checkbox"/>
White and Black African	<input type="checkbox"/>
White and Asian	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

Any other mixed background, please write in:

Asian/Asian British

Indian	<input type="checkbox"/>
Pakistani	<input type="checkbox"/>
Bangladeshi	<input type="checkbox"/>
Chinese	<input type="checkbox"/>

Prefer not to say	<input type="checkbox"/>
Any other Asian background, please write in:	
Black/ African/ Caribbean/ Black British	
African	<input type="checkbox"/>
Caribbean	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>
Any other Black/African/Caribbean background, please write in:	
Other ethnic group	
Arab	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>
Any other ethnic group, please write in:	
Do you consider yourself to have a disability or health condition? (Please tick the appropriate box)	
<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Prefer not to say
What is the effect or impact of your disability or health condition on your ability to give your best at work? Please write in here:	
What is your sexual orientation? (Please tick the appropriate box)	
<input type="checkbox"/> Heterosexual	<input type="checkbox"/> Gay <input type="checkbox"/> Lesbian <input type="checkbox"/> Bisexual <input type="checkbox"/> Prefer not to say
If you prefer to use your own term, please specify here:	
What is your religion or belief? (Please tick the appropriate box)	
<input type="checkbox"/> No religion or belief	<input type="checkbox"/> Buddhist <input type="checkbox"/> Christian <input type="checkbox"/> Hindu <input type="checkbox"/> Jewish
<input type="checkbox"/> Muslim	<input type="checkbox"/> Sikh <input type="checkbox"/> Prefer not to say
If you prefer to use your own term, please specify here:	
Do you have any caring responsibilities? (Please tick the appropriate box)	
None	<input type="checkbox"/>
Primary carer of a child/children (under 18)	<input type="checkbox"/>
Primary carer of disabled child/children	<input type="checkbox"/>
Primary carer of disabled adult (18 and over)	<input type="checkbox"/>
Primary carer of older person	<input type="checkbox"/>
Secondary carer (another person carries out the main caring role)	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

## 6. Appendix 2 - Exit Questionnaire

### CONFIDENTIAL - 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/Discrimination	<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		

**EQUALITY AND DIVERSITY MONITORING FORM**

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Gender (Please tick the appropriate box)

Man  Woman  Intersex  Non-Binary  Prefer not to say

If you prefer to use your own term, please specify here:

Are you married or in a civil partnership? (Please tick the appropriate box)

Yes  No  Prefer not to say

Age Band (Please tick the appropriate box)

16-24  25-29  30-34  35-39  40-44

45-49  50-54  55-59  60-64  65+

Prefer not to say

What is your ethnicity?

*Ethnic origin is not about nationality, place of birth or citizenship. It is about the group to which you perceive you belong.* (Please tick the appropriate box)

White

English	<input type="checkbox"/>
Welsh	<input type="checkbox"/>
Scottish	<input type="checkbox"/>
Northern Irish	<input type="checkbox"/>
Irish	<input type="checkbox"/>
British	<input type="checkbox"/>
Gypsy or Irish Traveller	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

Any other white background, please write in:

Mixed/multiple ethnic groups

White and Black Caribbean	<input type="checkbox"/>
White and Black African	<input type="checkbox"/>
White and Asian	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

Any other mixed background, please write in:

Asian/Asian British

Indian	<input type="checkbox"/>
Pakistani	<input type="checkbox"/>
Bangladeshi	<input type="checkbox"/>
Chinese	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

Any other Asian background, please write in:					
Black/ African/ Caribbean/ Black British					
African		<input type="checkbox"/>			
Caribbean		<input type="checkbox"/>			
Prefer not to say		<input type="checkbox"/>			
Any other Black/African/Caribbean background, please write in:					
Other ethnic group					
Arab		<input type="checkbox"/>			
Prefer not to say		<input type="checkbox"/>			
Any other ethnic group, please write in:					
Do you consider yourself to have a disability or health condition? (Please tick the appropriate box)					
<input type="checkbox"/> Yes		<input type="checkbox"/> No		<input type="checkbox"/> Prefer not to say	
What is the effect or impact of your disability or health condition on your ability to give your best at work? Please write in here:					
What is your sexual orientation? (Please tick the appropriate box)					
<input type="checkbox"/> Heterosexual		<input type="checkbox"/> Gay	<input type="checkbox"/> Lesbian	<input type="checkbox"/> Bisexual	
<input type="checkbox"/> Prefer not to say					
If you prefer to use your own term, please specify here:					
What is your religion or belief? (Please tick the appropriate box)					
<input type="checkbox"/> No religion or belief	<input type="checkbox"/> Buddhist	<input type="checkbox"/> Christian	<input type="checkbox"/> Hindu	<input type="checkbox"/> Jewish	
<input type="checkbox"/> Muslim	<input type="checkbox"/> Sikh	<input type="checkbox"/> Prefer not to say			
If you prefer to use your own term, please specify here:					
Do you have any caring responsibilities? (Please tick the appropriate box)					
None		<input type="checkbox"/>			
Primary carer of a child/children (under 18)		<input type="checkbox"/>			
Primary carer of disabled child/children		<input type="checkbox"/>			
Primary carer of disabled adult (18 and over)		<input type="checkbox"/>			
Primary carer of older person		<input type="checkbox"/>			
Secondary carer (another person carries out the main caring role)		<input type="checkbox"/>			
Prefer not to say		<input type="checkbox"/>			

## 7. Appendix 3 - Letter to Accompany Appendix 2 Exit Questionnaire

Private & Confidential

Dear [insert employee name]

As part of our ongoing commitment to equality and diversity and improving the working lives of staff at our school, I should be grateful if you would take a few minutes to complete the enclosed exit questionnaire and return it to me in the envelope provided.

Your views are important to us, and the information gathered from exit questionnaires is used in collaboration with other initiatives to improve employment practices and the retention of staff at our school. I would like to emphasise that this is a voluntary and completely confidential process.

I look forward to receiving your completed questionnaire and take this opportunity to thank you for your service to the school.

Yours sincerely

Headteacher

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Policy created: 04/2011

### 24 Oct 2023

Policy has been reviewed and refreshed. Refer to the Schedule of Amendments for full detail. [Schedule of amendments](#)

### 23 Jun 2021

Policy has been reviewed and refreshed. Refer to the Schedule of Amendments for full detail. [Schedule of amendments](#)