**GUIDANCE ON EXIT INTERVIEWS**

Employees who leave the school/academy ideally should have an exit interview before they leave. Exit interviews may help to identify trends within the school/academy/Trust.

The purpose of the exit interview is to identify from the employee’s experience, any ways in which the role can be improved and/or their successor (if any) can be helped to do their job. It also acts as an opportunity to confirm the reason for leaving and to thank people for their valuable service to the school/academy.

The person conducting the exit interview should, ideally, not be the employee's line manager. It is an informal process with no rigid agenda and should be viewed as a constructive exercise by both parties.

Schools and academies can use the template Exit Interview Form and Checklist when an employee leaves to gather more information about their reason/s for leaving the school/academy. In addition to completing the form, the employee could be asked to comment on:

* how they feel the school/academy and their department worked;
* how they felt about the systems in place i.e. managerial, professional, administrative, financial, IT etc;
* what the employee found enjoyable and/or frustrating about their role;
* any problems the employee encountered, that made their job more difficult;
* what could be done to make their job easier;
* advice for the successor;
* any other suggestions; and
* reason/s for leaving.

Once completed the exit interview form should be completed and placed on the employee’s personal file, and the manager who carried out the exit interview will need to take any action required as a result of the discussion.

**EXIT INTERVIEW FORM**

|  |  |
| --- | --- |
| **EMPLOYEE DETAILS** | |
| Name: | Employee number: |
| School/Academy: | Dept: |
| Job title: | Grade:       Salary: |
| Date started current post: | Date of leaving: |
| New employer: | New position:        Salary (if known): |
| **REASON FOR LEAVING** | |
| If more than one reason please put two ticks against the most significant one.  Salary  Pregnant  Dissatisfaction with work  Spouse/partner/parents moving  Colleagues  Other domestic  Lack of prospects  Traffic difficulties  To widen experience  Preference for another area  Promotion  Other (please state)    Retired    Supervision | |
| Employee remarks    Interviewer’s remarks | |
| ***In accordance with the provisions of the Data Protection Act you need to be aware that your personal records will be retained by The Learning Alliance for 7 years at which point they will be destroyed.***  **Signed Employee:**  **Signed Interviewer:**  **Date:** | |

**EXIT INTERVIEW CHECKLIST**

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| --- |
| Name:       Employee number:  Letter of resignation received: Yes/No  Confirmed leaving date: |
| **Headteacher/principal/manager to ask following questions:**  Do you have any outstanding annual leave which you  will not be taking before you leave the school/academy? Yes/No        Have you taken more annual leave than you are now entitled to? Yes/No  Did you receive post entry training? Yes/No        Do you have an email account? Yes/No        Do you have access to any internal/external ICT systems? Yes/No       ***Please ensure that you and your line manager close down access to these systems***  Do you have a school/academy purchase card (credit card)? Yes/No        Do you raise requisitions or approve invoices? Yes/No  *If yes, identify the member of staff who will now deal with those invoices and reassign your inbox to them. Guidance on this can be given by the IT team, and* ***must be completed at least two days before the date of leaving.***  Have you handed in your ID badge, fob, keys and car park pass (if applicable)? Yes/No        Do you have a school/academy mobile phone? Yes/No       Do you have a school/academy laptop/bag or any ICT equipment? Yes/No  Do you have any outstanding balance/debt on your meal account? Yes/No        Do you have any other school/academy property to return? Yes/No |

***If the employee answered yes to any of these questions, you as the headteacher/principal/manager need to check if they have any outstanding balances and arrange for any necessary pay adjustments through your payroll provider or cancel their access as appropriate.***

**To Do list:**

**ICT Access Information**

# Yes N/A

⬜ ⬜ Employee to purge email of any personal emails

⬜ ⬜ Remove employee’s name from email group lists

⬜ ⬜ Remove employee’s name from distribution lists

⬜ ⬜ Remove employee’s name from internal/office phone lists

⬜ ⬜ Close computer access

⬜ ⬜ Disable access to software

⬜ ⬜ Change or transfer phone extension

⬜ ⬜ Change voicemail

⬜ ⬜ Activate ‘out of office’ with standard message for email

⬜ ⬜ Transfer documents to shared area / named colleague

⬜ ⬜ Transfer access to payslips to a personal email if necessary

**Office / Classroom Access**

# Yes N/A

⬜ ⬜ Clean work area and remove personal belongings

⬜ ⬜ Handover keys to filing cabinets etc. to head of department