

Leavers Policy	Version:	V1.1
	Status:	Final
	Date:	18/1/21

1. Approval Record

Name	Role	Date
Rebecca Clake	Head of People	1/1/20

2. Version History

Version	Date	Author	Description (nature of change/update)
V1.0	1/1/20	Rebecca Clake	Initial Creation – Document design
V1.1	18/1/21	Rebecca Clake	Annual review and version control update

3. Related Documents

Document Title	Location	Version Number

4. Review and Distribution List

Name	Role	Review Required
Rebecca Clake	Head of People	Contributor/Reviewer
	All Staff	For Information Only

5. Regulatory Requirements

None

6. Introduction

6.1 Purpose

This policy sets a framework to outline the process for employees and temporary workers or contractors leaving We Are Digital (WAD), including the responsibilities of line managers, to ensure that a standard and consistent approach is adopted.

6.2 Scope

This policy applies to all members of staff who work under a contract of employment with We are Digital. It also applies to agency staff, contractors, and others employed under a contract of service.

6.3 Overview

A sound leaving procedure helps to ensure that:

- Line managers understand their responsibilities and have a clear process to follow
- Employees understand what is expected from them
- Security of confidential information, premises, etc. is maintained
- All Company property is returned to the organisation in a timely manner

From an employee perspective, leaving a job is an important and potentially stressful event, particularly in cases of retirement, redundancy etc., and how WAD manages this process has an impact on the employees lasting impression and experience of the Company. A well-managed leaving process helps to ensure that the transition is as smooth and stress-free as possible for both the leaving employee and the line manager.

7. Roles and Responsibilities

RACI	Role	Role Holder(s)	Key Responsibilities
Responsible	Process SME	Rebecca Clake	<ul style="list-style-type: none"> • Ensuring process document accurately reflects current practice • Contributing to process changes and improvements, as and when identified
Accountable	Process Owner	Rebecca Clake	<ul style="list-style-type: none"> • Overall ownership and accountability for process definition and execution • Leading change for improving the process • Approval point for any changes/update to the process definition • Ensuring that any changes are properly documented and communicated • Ensuring that ongoing monitoring is in place and carried out
Consulted	Head of People	Rebecca Clake	<ul style="list-style-type: none"> • Monitoring adherence to agreed process through periodic quality reviews
Informed	All Staff		<ul style="list-style-type: none"> • Read and accept of document must be completed in HR system • To be included in subcontractor paperwork

8. Instruction

8.1 Management Responsibilities

The leaver's line manager is responsible for ensuring the completion of the leaving process, and for ensuring that all the areas outlined in the Leaver's Checklist (appendix 3) are followed and completed.

In cases of planned departure, the leaving process should begin where possible at least 4 weeks before the employee's end date, with appropriate notification to the leaving employee of what is required from them and when.

8.2 Employee Responsibilities

The leaving employee will work with the line manager to complete the Leaver's Checklist and ensure that any items requested are returned in good time. The employee will sign the checklist when requested to do so by the line manager, prior to the leaving date.

In cases of resignation and retirement, the employee is responsible for submitting their notice in writing to the line manager and ensuring that the contractual notice period is observed.

8.3 Leavers Checklist

The Leavers Checklist (appendix 3) should be used by the line manager, with employee's input and cooperation, to ensure that all relevant areas are covered prior to the employee's departure.

The leaver's checklist is comprehensive and must account for different working situations across the Company. As a result, not all the issues highlighted will apply to each leaver, so it is up to the line manager to determine which issues are applicable.

Notice period: the employee's notice period is detailed in their terms and conditions of employment, and the line manager should take this into account when agreeing a leaving date. If the line manager is unsure of the notice period required, they should contact Human Resources for clarification.

Notifications: notification requirements depend on the reason for leaving, and may include the reasons listed below:

- **Resignation:** the line manager must ensure that they are provided with a resignation in writing (by letter or email) from the employee. The line manager will then ensure that HR respond to the employee in writing acknowledging the resignation.
- **Retirement:** legally and procedurally retirement is the same as resignation, the only difference is that the leaving employee will start claiming their pension. The line manager must ensure that they are provided with a written notification of the proposed retirement date (by letter or email) by the employee. The line manager will then ensure HR respond to the employee in writing acknowledging the retirement. Pension information will be provided separately by the pension providers.
- **End of fixed term contract:** where a fixed term contract is due to expire, the line manager should contact Human Resources to ensure that the correct process is followed.
- **Redundancy or dismissal:** this should only result from a formal process, in which Human Resources will have been involved. HR will work with the line manager through the relevant process and will ensure that relevant documentation is issued.

8.4 Annual Leave

The annual leave will be pro rated for the relevant holiday year up to the leaving date – if line managers are unsure of the pro rated annual leave entitlement, they should contact the relevant Head of People for clarification.

The employee should normally take their outstanding annual leave before the agreed leaving date. Where this is not feasible (e.g. due to service provision or individual circumstances), a payment will be made with their final salary.

If the employee has taken more annual leave than their entitlement, this will be deducted from their final salary.

8.5 Relevant Paperwork

The line manager must complete a Leavers Form (appendix 1) as soon as the leaving date is known. The completed form must be sent to the Head of People as soon as completed. Any expense claim forms with final additional payments due should be sent to the accounts team at the same time. This ensures that the final payment can be adjusted accordingly.

8.6 Return of Company Property

The line manager is responsible for ensuring that any Company assets in the leaving employee's possession (listed in the leaver's checklist) are returned upon termination of employment.

8.7 Handover of Work

Where relevant, the line manager must ensure that an adequate handover of work tasks takes place between the leaving employee and any successor. This will include passing over of any business information held by the employee (in electronic or paper format).

8.8 Confidentiality

The line manager will remind the leaving employee of the confidentiality statement in his/her terms and conditions of employment or the confidentiality agreement, which continues to apply after termination of employment.

8.9 Informing Relevant Departments

The line manager will inform relevant senior management that the employee is leaving (prior to the leaving date), and whether access to the employee's email and network account will be required after the termination date. The HR team will ensure the relevant persons are informed and the following actions are carried out:

- all user accounts that the ex-employee was privy to on the network will be disabled either by deletion or by a change of password (as instructed by the ex-employee's manager)
- any received e-mails will be redirected to the relevant member of staff or an out of office put in place signposting where to send messages, whichever is applicable
- the user will be removed from any email distribution lists
- the user will be removed from the phone lists

Where a line manager requests to keep access to data or email following an employee's departure, this should be for a limited time only. The line manager should save any information which may be required in the future elsewhere, to allow for the account to be deleted.

The relevant person must be informed of an employee's leaving date so that the fob can be deactivated.

- Where an employee is an authorised signatory, the Finance Manager must be notified of their imminent departure as soon as possible.

8.10 Exit Interview

An exit interview will be offered to staff who are ending their employment with the company. Exit interviews are not carried out with staff who have been dismissed from their role.

The line manager should offer an exit interview to the employee as soon as the leaving date is agreed. The purpose of an exit interview is:

- to provide all employees leaving the Company with the opportunity to give honest feedback
- to improve and gain an understanding of why staff leave the Company
- to give feedback so that the line manager can be aware of any issues that might have arisen and to take learning points (positive and negative) on the way the team works and on the services it provides
- to use the information obtained to make improvements to the Company through changes in policy and practice
- to bring any inappropriate practices to the attention of senior management
- to consider whether change to the role and job description are necessary.

Care and sensitivity must be maintained in handling the exit interview. The exit interview must be with someone with whom the leaver feels they may speak honestly. In most instances this will be the line manager. If, exceptionally, the employee does not feel comfortable having this discussion with their line manager, they can approach the Head of People as an alternative. The line manager should inform the employee that they have the option of speaking to the Head of People at any point throughout the process.

The Exit Interview Form (appendix 2) provides a framework for the line manager to lead the discussion. The form is comprehensive and has to account for different leaving circumstances, and the line manager will adjust the interview based on the information which is relevant to the particular leaving employee. The completed form should then be signed by both the leaver and the line manager and returned to the Head of People with the Leavers Checklist.

If the line manager is unable to arrange the exit interview (e.g. due to the employee's sickness absence or annual leave), he/she should inform the Head of People as soon as possible, and request for the Exit Interview Form to be sent out to the employee to complete. The line manager should encourage the employee to complete and return the form.

8.11 Temporary Workers and Contractors

Where workers are not employees but are carrying out work on behalf of WAD there will still be some requirement to follow a leavers process to protect the company against security breaches and equipment loss.

Temporary workers may not always inform the company of their intention to leave and therefore it is there responsibility of the line manager to monitor staff attendance and act upon continued absence.

Line Managers will be responsible for liaising with agencies who provide temporary workers to inform of non-attendance and ensure individuals are contacted to establish if they will be returning.

Where the temporary worker is a contractor it is expected that the contractor will provide notice of their intention in writing (letter or email) with at least 30 days' notice as per their contract.

Line Managers will be responsible for completing a Temporary Worker/ Contractor Leaver Checklist (Appendix 4) and returning this to the Head of People.

Under no circumstances are the accounts or passwords of a leaver to be shared or used by another temporary worker.

Where the leaver is a temporary worker through an agency the line manager must ensure that an accurate record of attendance has been submitted by the agency before approving for payment.

Where the leaver is a contractor they must submit their final invoice prior to the termination of the contract to the finance team

Appendix 1: Leavers Form

This form should be completed by the line manager as soon as the employee's leaving details are agreed. It must be returned to the HR contact, together with a copy of the resignation letter (where relevant).

Please ensure the form reaches the Head of People **before the leaving date**, and at the latest by **the 20th of the month** in which the employee leaves, together with any expense claims with final additional payments due (where relevant). This is to ensure final pay can be adjusted appropriately.

Employee name		
Job Title		
Department		
Leaving details		
Reason for leaving (please state):		
Comments:		
Date resignation/retirement notice received		
Last day of employment (i.e. leaving date)		
Last working day (if different from above)		
Annual leave		
Annual leave entitlement for this year up to the date of leaving:		
Annual leave taken/booked: Annual leave due/owed:		
Additional payroll information		
Details of any outstanding money owed by the employee (e.g. compensation for not returned Company property, overpayments)		
Details of any outstanding payments due to the employee (those provided separately on variation sheets, expense forms)		
Forwarding address, telephone number, email address:		

Manager's name (print):

Job title:

Manager's signature:

Date:

Appendix 2: Exit Interview Form

Employee Name	
Job Title	
Team	
Employment Start Date	
Leaving Date	
Date of exit interview	
Manager conducting the meeting	

Reasons for leaving:

1. Why have you decided to leave the We Are Digital?

2. How much did the following factors influence your decision to leave? (please tick)

Personal/External	Not at all	Small amount	Moderate amount	Large amount
End of a fixed term contract				
Advancement of career				
Needing to broaden experience				
Relocating				
Commuting distance				
Family circumstances				
Personal health				
Return to education				
Retirement				
Other (Please describe):				

Role/Benefits	Not at all	Small amount	Moderate amount	Large amount
Type of work (job content, duties)				
Workload or hours/schedule				
The physical work environment (buildings, equipment etc)				

Work environment - other (stress, frustration, rules, etc)				
Pay				
Benefits				
Advancement/promotion opportunities				
Adequacy of training and/or development				

Organisation/Environment	Not at all	Small amount	Moderate amount	Large amount
Fairness of treatment by line management				
Recognition/appreciation from line management				
Relationships with colleagues in your department/team				
Relationships with colleagues in other departments/teams				
Senior management's actions and decisions				
WAD's reputation or performance				

3. Did a single event trigger your decision to leave? **Y/N** *If yes:*

- can you tell us about that?
- have you shared your concern(s) with anyone in the Company prior to leaving?
- what could have been done early on to prevent the situation developing and how could the Company manage these issues better in the future?

4. If you are going to another job:

- who will you be working for:
- what kind of work will you be doing:
- what is it that attracted you to the new job/employer:

Your employment with We Are Digital:

5. What did you like most about your job and the Company, and why?

6. What did you like least about your job and the Company, and why?

7. Were your duties clearly defined? **Y/N** Did they match your expectations? **Y/N**
If No, please provide further details:

8. Did you receive appropriate training to do your job effectively? **Y/N**
If No, what other training would like to have received? Have you raised this with your manager before?

9. Did you receive appropriate support to enable you to your job? **Y/N**
If No, please provide further details

10. Did you ever experience or witness discrimination, bullying, harassment, victimisation or hostile working conditions at the We Are Digital? **Y/N**
If Yes, please provide further details

11. Please rate how you feel about the following aspects of your work (please tick):

	V. Good	Good	Fair	Poor
Level of support by line manager				
Working relationship with colleagues				
Teamwork				
Communication within department				
Organisational communication				
Performance management/appraisals				
Learning & development opportunities				
Advancement/promotion opportunities				

Pay and benefits					
Staff recognition					
Any additional comments regarding ratings above:					
12. Were you aware of the Company vision, mission and values, and did you identify with them?					
13. Do you feel that the Company operates in accordance with its stated vision, mission and values? Y/N					
14. Would you consider working for the WAD again? Y/N					
15. Would you recommend working for WAD to your family/friends? Y/N					
Any other comments?					

Signature of Exiting Employee	
Signature of Person carrying out interview (where relevant)	

Appendix 3 Leavers Checklist

This checklist is to be completed by the line manager, with the employee's input and cooperation, prior to the employee's leaving date. Once completed, the form should be returned to the HR contact, together with the completed exit interview form.

Employee's name and job title:	
Team:	
Last day of employment:	

Checklist:	Who Responsible	Date Completed	Actioned by
Resignation/retirement letter received from employee	Employee		
Agree a leaving date with the employee	Manager		
Complete a Leavers Form and send to HR contact together with the resignation letter	Manager		
Write letter to employee acknowledging resignation	HR		
Remind the employee of the contractual confidentiality clause, which applies after termination of employment	Manager		
Decide whether access will be required to employee's files or email account and inform relevant Senior Manager	Manager		
Inform Senior Management of the employee leaving date	HR		
Inform Finance Manager of the employee leaving date	HR		
Request IT provider to remove access to all accounts and systems	Manager		

Submit any outstanding variation sheets or expense claims to Finance team	Manager / Employee		
Inform Finance Manager of leave date and outstanding holiday due to be paid	Finance Manager		
Arrange handover of work with the employee	Manager		
If the employee is the appointed First Aider or Fire Marshal, arrange replacement	HR contact		
Inform HR contact if need to recruit for replacement	Manager		
Advertise and recruit for replacement	HR contact		
Inform Facilities / Office provider and request for the fob to be deactivated	Manager		
Conduct exit interview with the employee/request for exit questionnaire to be sent out	Manager / HR contact		
Organise farewell function/card/gift as appropriate	Manager		
Return of Company property	Date	Received by	
Room key			
Desk key			
Mifi device			
USB drive (Return to Line Manager)			
Fob (return to Facilities / Building provider)			
Mobile phone (return to Line Manager)			
Laptop/Computer (Return to Line Manager)			
Company credit card (return to Finance)			
Staff ID badge (where applicable)			
Business cards			

Any other resources belong to the WAD (list below):		

Signature of Exiting Employee		Date	
Signature of Line Manager (where relevant)		Date	

Please return this form to the Head of People, together with the completed exit interview form.

Appendix 4: Temporary Worker/ Contractor Leaver Checklist

This checklist is to be completed by the line manager as soon as they are aware of the leaving date. Once completed, the form should be returned to Human Resources.

Temporary Worker / Contractor name and job title:

Department:

Last day of work:

	Checklist:	Who Responsible	Date Completed	Actioned by
	Resignation/ No show/ letter received from individual	Worker / Contractor		
	Agree a leaving date with the temporary worker / Contractor if applicable	Manager		
	Remind the temporary worker / contractor of the contractual confidentiality clause, which applies after they have left	Manager		
	Inform Senior Management of the worker / contractor leaving date	Manager		
	Request IT provider to remove access to all accounts and systems	General Manager		
	Request replacement temporary worker from agency (if applicable)	Manager		
	Recruit replacement contractor (if applicable)	Tutor Manager		
	Arrange collection of WAD equipment from contractor	Manager		
	Inform Facilities / Office Provider and request for the fob to be deactivated (if applicable)	Manager		
	Return of Company property	Date	Received by	

	Room key		
	Desk key		
	Mifi device		
	USB drive (Return to Line Manager)		
	Laptops		
	Fob (return to Line Manager)		
	Projector		
	Charging cables		
	Extension leads		
	HDMI adapter		
	Uniform		
	Teaching content and Tutor folder		
	Any other resources belong to the WAD (list below):		

Manager's signature: _____ Date: _____

Please return this form to Head of People together with the completed exit interview form.

9. Quality Control Log

No	Risk/Issue	Control	Control in Place Y/N
1	Inconsistent execution of the process by different people/departments	Staff to review policy on annual basis	Y

10. Glossary

Term	Description