



# NEWMAN CATHOLIC TRUST

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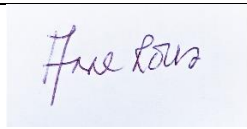
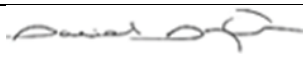
## Exit Policy & Questionnaire

September 2023-24

### Review

Review Cycle	Date of Policy	Author(s) Policy	Review Date
Annual	5 <sup>th</sup> October 2023	CEO + LA	October 2024

### Ratification

Role	Name	Signature	Date
Chair of Board	Anne Rolls		26/10/2023
CEO	Dr Daniel Doyle		26/10/2023

# Next review date: September 2024

## 1. Introduction

1.1 Employees are our Trust's most valuable resource and the ability to retain good employees is very important. This procedure sets out an approach to identifying why people decide to leave the Trust or its school so that any workplace problems can be identified and addressed.

People choose to leave their employer for many different reasons. Sometimes the nature of the job or rate of pay may have a bearing, sometimes a more challenging or interesting job may become available, sometimes a change in personal circumstances is the main reason for the decision. Whatever the reason, the Trust and its Local Governing Committees (LGCs) should be aware of how the school is viewed as a place to work. The usual ways of gaining this information are:

- Annual Employee Survey
- Exit Questionnaire (Appendix A)
- Exit Interviews

It is good practice to undertake exit interviews to collect and analyse information with a view to developing retention strategies and to highlight areas for improvement, which can be fed into the Trusts' strategic plan.

1.2 This policy will be applied to all staff members, except in the case of dismissal or in exceptional circumstances. This policy applies to teaching support and central MAT staff (temporary or permanent).

## 2. Objectives

The procedure aims to provide:

- A consistent approach to the use of exit questionnaires across the Trust
- Guidance on how and when to use an exit questionnaire/interview
- Guidance on how to conduct an exit interview.

## 3. Purpose

The purpose of this policy is to determine the reasons why staff members leave the Trust and its schools. The Trust and its schools will utilise this information to ensure it meets its obligation as a good employer. The purpose of the completion of the exit interview form is to:

- Determine and document the reasons staff members leave, to solicit constructive feedback to improve effectiveness and/or efficiency of central and school operations and/or employee's work life.
- Identify what the Trust and its schools are doing well.
- Analyse information to inform recruitment and retention practices.
- Display openness and integrity by providing all employees leaving the Trust an opportunity to provide feedback.
- Bring to the attention of the senior leadership team or the Board any issues and provide feedback to enable any remedial action to be taken.
- Assist in identifying changes and improvements necessary to any existing job for any new employee, or a review of roles, responsibilities and staff deployments.
- Contribute to increased long-term performance and improve the overall work environment.
- Help the Trust to assess if its Mission and Values are being enacted

## 4. Scope

The procedure applies to all Trust employees who leave voluntarily. Exit interviews should not be carried out with employees who:

- have been dismissed on capability or disciplinary grounds
- leave because of compulsory redundancy or ill health retirement or under a compromise agreement

## **5. Summary of Sequence of Events**

- Employees indicate that they are resigning from their post and submit a letter of resignation which includes the date which will be their final day of service (in line with their contract terms and conditions and resignation/notice period).
- The Line Manager/School Leader (Chair Board, CEO, Executive Principal, Principal or Head of School) should acknowledge the resignation and inform HR.
- HR should issue a standard Exit Interview Questionnaire (Appendix 1) with a covering letter (Appendix 2) to the employee. These can also be issued by a member of the Senior Leadership Team.
- The employee should complete the Exit Questionnaire and return it to their Line Manager, a member of SLT, a school governor/Trust Director or to HR.
- A suitable and agreed individual will conduct the Exit Interview using either Microsoft Teams or in person. This can be a member of HR, a Governor/Director or a member of SLT – depending on who is appropriate and in agreement with the member of staff leaving.

### **Trust response/CEO.**

- Where any areas of concern are discovered and/or where patterns of negative answers to questions are identified, the situation will be looked into by the CEO and HR or Board Chair and HR (depending on the exiting employee) and an action plan should be developed in response to these concerns.

## **6. General Principles**

### **6.1 Policy Statement**

The Trust recognises that motivated and happy employees are central to the Trust's vision of "Being a Leading Provider of sustainable Catholic Education". Conducting exit interviews, provides an opportunity to acknowledge and thank employees for their service and work with the Trust, and to wish them well for their future endeavours. Their goodwill plays an essential part in maintaining the ongoing positive profile of the Trust.

### **6.2 Recording of Information**

The information gathered will be analysed by the CEO and HR to identify positive feedback, areas of concern/trends and report results to the FAR Committee.

### **6.3 Serious Issues**

If serious matters are raised by the employee during the exit interview, the CEO will nominate an appropriate manager to deal with this supported by HR. In the case of the Central MAT Team this may be a Board member supported by HR.

### **6.4 Confidentiality**

HR will maintain a central record of the information received via exit interviews which should be used to produce relevant data for the Trust's appropriate Committee.

The CEO (or Board Director) and HR will agree how much of the interview is to be kept confidential and what information should be used to suggest improvements to the Trust or school.

## **7. Procedure**

### **7.1 Application of the Policy**

The CEO/Line Manager/School Leader will ensure that this policy will achieve the desired outcomes by:

- Ensuring that staff are aware of this policy
- Treating information as confidential
- Ensuring references are not prejudicial

### **7.2 Notification of Intention to Resign**

Individuals should notify their Line Manager/School Leader of their intention to resign as soon as possible but giving no less than the period of notice in their contract of employment.

The CEO/Line Manager/School Leader must acknowledge the resignation and complete the termination form and send it to the HR and Payroll Inbox.

The CEO/ Line Manager/School Leader must return personal belongings to the individual and arrange for belongings to be returned, e.g., laptop, ID, and keys.

The CEO/Line Manager/School Leader must notify HR requesting for an exit interview questionnaire to be issued

The Manager/Headteacher must notify IT to close the individual's e-mail account, SharePoint and their access to school information and electronic files.

### **7.3 Exit Interview Questionnaire**

HR should then provide the individual with a letter (Appendix B), which invites them to complete an exit interview questionnaire, (Appendix A) and an offer of an exit interview at a time suitable to the employee before he/she leaves the school/Trust.

The model letter (Appendix B) should be adapted to the individual circumstances as necessary.

Completing the exit questionnaire will help focus the employee on the key issues before the exit interview and will assist in eliciting useful information during the interview.

If the individual is not at work during the notice period, they should be sent the questionnaire via email. Once completed, the questionnaire should be taken by the employee to the exit interview or returned to HR via email.

A work colleague or trade union/professional association representative may accompany the individual if they wish.

## **8. Data Impact Assessment**

8.1 At all stages of this procedure, data obtained will be used only for the purpose for which it is intended and will be stored securely with restricted access to those involved in the process. Following the process, data will be stored on the electronic personal file for the duration of the employee's employment with the Trust and for 6 years thereafter.

The data will be destroyed at this time using a confidential shredding service.

## **9. Equality and Diversity**

9.1 This policy has been assessed by the Trust Board, if on reading this policy you feel there are any equality and diversity issues, please contact HR or the CEO who will, if necessary, ensure the policy is reviewed

APPENDIX A:

QUESTION	NOTES
<i>Why did you decide to leave?</i>	
<i>What are you going to do next?</i>	
<i>Why did you begin looking for a new job? (if applicable)</i>	
<i>What ultimately led you to accept the new position? (if applicable)</i>	
<i>What did you like about this school/your role?</i>	
<i>Did you find the job rewarding? Did you find the job challenging? Why?</i>	
<i>Did you feel valued and appreciated in your role?</i>	
<i>How would you describe the culture of our school/the Trust? Can you give specific examples?</i>	
<i>What would you change about the school/the Trust/your role?</i>	
<i>Do you feel the pay and benefits (pension, flexible working etc.) are fair for your role and responsibilities?</i>	
<i>Did you feel you had the tools and skills that enabled you to do your job well? What could have been improved?</i>	
<i>What are your thoughts on the training and development opportunities (CPD) you have received at the school/Trust?</i>	
<i>What are your thoughts on communication at the school/Trust?</i> <i>a) with parents</i> <i>b) with staff</i> <i>c) with governors</i> <i>d) with Directors</i>	
<i>What are your thoughts on appraisal at the school/Trust?</i>	
<i>Were you comfortable talking to your line manager about work problems?</i>	
<i>What are your thoughts on the leadership of the school/Trust?</i>	
<i>Did you feel you were kept up to date on new developments and school/other policies?</i>	

QUESTION	NOTES
<i>How would you describe your workload/working hours?</i>	
<i>Is there anything we could have done differently that would have made you stay?</i>	
<i>Would you recommend us as a place to work?</i>	
<i>Is there anything else you wish to discuss or say?</i>	

Statement	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not applicable
<i>I enjoyed my time working at this school/Trust.</i>						
<i>My work was valued and appreciated.</i>						
<i>There were good opportunities for career progression.</i>						
<i>I was paid fairly for my work.</i>						
<i>My working conditions were good.</i>						
<i>My working environment was nice and well-maintained.</i>						
<i>Health and safety issues were properly addressed.</i>						
<i>Changes within the school/Trust were well-managed.</i>						
<i>I was given the necessary training to carry out my duties effectively.</i>						
<i>I received the support I needed to carry out my role effectively.</i>						
<i>My ideas and comments were listened to.</i>						
<i>The job made use of the full range of my abilities.</i>						
<i>I generally felt I was in control of my job.</i>						
<i>Workload and work/life balance issues were well-managed.</i>						
<i>Whilst working at the school/Trust, I have been able to maintain a good quality of life outside work.</i>						
<i>Workplace bullying and harassment issues were not tolerated by management.</i>						
<i>Any incidents of workplace bullying were identified and dealt with quickly.</i>						
<i>I got on well with my colleagues.</i>						
<i>I got on well with the pupils at the school.</i>						

Statement	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not applicable
<i>I got on well with the senior leadership team, including the headteacher.</i>						
<i>I would recommend the school/Trust as a great place to work.</i>						
<i>Do you feel you had a good understanding of the Trust's values during your working period?</i>						
<i>How well do you feel the Trust values were lived across the Trust and put into practice?</i>						

**Please add any additional comments here**

Thank you for completing the questionnaire – your feedback will be taken into consideration.

**UK GDPR and Data Protection Act 2018**

The information provided by you on this form as an applicant will be stored securely either on paper or electronically in accordance with our obligations under the UK GDPR and Data Protection Act 2018. The information provided will be processed solely for the purpose of recruitment and any other activity relating to this recruitment. For more information in relation to how we process your personal data, please see our privacy policy or contact us for more information.

**I hereby give my consent for the information provided on this form to be held on computer or other relevant filing system and to be shared with other third-party processors for the purpose of this recruitment in accordance with Data Protection 2018 and UK GDPR.**

## APPENDIX B: MODEL LETTER AND EXIT QUESTIONNAIRE

CONFIDENTIAL

(Name of Employee)  
(Address)

Dear (name of employee),

Thank you for your letter of resignation received on **date**. I am confirming acceptance of your resignation and confirming that your last working day will be **date**.

Insert any personal details such as outstanding holiday, good wishes, thanks etc.

Please find enclosed an Exit Questionnaire, which I would be grateful if you would complete and return to me. The purpose of the questionnaire is to seek your views about the school as a place to work. The information that you provide will help the Trust and its schools to review, update and/or replace, as appropriate, existing employment policies, procedures and practices.

We value your honest feedback to help us continually improve in these areas. The questionnaire is confidential. Your responses will not be used in any way that can be attributable to you.

Your questionnaire will be destroyed as confidential waste not later than six years after you have left the school.

You may wish to have an exit interview with **insert name** as well as, or instead of, completing the questionnaire - please let me know your preference.

Thank you for your assistance with our exit questionnaire and best wishes for the future.

Yours sincerely,