

# EXIT SURVEY AND CHECKLIST FOR MANAGERS

## Information for Managers

It is important that procedures are in place to ensure that staff leaving <insert department name> are managed appropriately and the transition is smooth.

Under most circumstances, staff leave on a positive note, sad to leave the organisation but looking forward to the next phase in their lives. On occasion, however, staff leave because they are unhappy with the organisation or individuals within the organisation. Feedback from these situations can be used to assist in making changes that will be of benefit to staff in the future. Staff turnover costs the organisation a considerable amount in terms of recruiting and training costs and it is important that these costs are minimised.

### Notice Period

There is not a mandatory notice period, however the <insert department name> Certified Agreement <insert certified agreement name> suggests that where practical, an employee should give at least two weeks notice in writing of their intention to resign or retire.

In the circumstance where staff are being terminated the <insert authority figure> must provide an employee with no less than the notice periods outlined in the <insert certified agreement name> or in the Workplace Relations Act 1996, whichever is the greater.

### Instructions for Conducting the Exit Interview

It is not mandatory for an exit interview to be completed and the employee should not be forced to complete the exit interview if they do not want to. The final checklist must be completed by the manager of the employee to ensure all <insert department name> property has been returned. The employee has received their own checklist to complete and return to the manager. A specific time should be arranged with the employee on their final day in order to complete the exit interview and / or exit checklist.

Explain to the employee the reasons for conducting an exit interview, that is, to assist <insert department name> to understand employee's thoughts regarding the organisation and their employment. Make it clear that notes will be taken however all comments are strictly confidential.

### Disgruntled Staff

Staff are strongly encouraged to address issues in the workplace. Ceasing employment with <insert department name> in order to resolve a problem should be a last resort.

In the first instance, it is usually a good idea for the individual to talk to their supervisor about work related problems. Work-related problems are often experienced by more than one individual; sometimes one person taking a stand will be enough to start the process of resolving the problem for everyone. Employees may also discuss problems with a harassment contract officer who are trained and willing to discuss issues, including those not strictly related to harassment or discrimination. The Employee Assistance Program offers the opportunity for staff to talk to a trained professional counsellor about problems that may be impacting on their ability to cope in the workplace.

## EXIT SURVEY

**FULL NAME**.....

**POSITION**.....

**PROGRAM** .....

**DATE OF SEPARATION**..... **LENGTH OF SERVICE** .....yrs.....mths

**TYPE OF SEPARATION** (Circle one)

1. Resigned                      2. Retired                      3. Health                      4. Other \_\_\_\_\_

**Is the employee moving to another job?      YES / NO**

**If "Yes" - What job and where?**.....

Describe any conditions making new job more attractive than their job at <insert department name>.....

.....  
.....  
.....

**If "No" - Explain** .....

.....

**Was any action taken to retain the employee in the position?      YES/NO**

Explain .....

**If the employee has resigned, what are their reasons for resignation?** .....

.....  
.....  
.....  
.....

Comments regarding the employee's general thoughts about <insert department name> as an employer and suggestions as how to make it a better place in which to work.

**1. WAGES/SALARY**

General thoughts on salary,  
comparisons to similar positions  
inside and outside <insert department name>

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**2. CONDITIONS OF SERVICE**

Comments can include leave,  
flextime, allowances, work/life  
balance etc

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**3. ABOUT THE JOB**

Comments regarding the duties  
of the position, work pressures,  
likes / dislikes, suggested changes

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**4. SUITABILITY OF JOB**

If job didn't suit employee's  
abilities or interests what sort  
of person would it suit better?

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**5. PERSONAL RELATIONS**

Relationships within <insert department name>,  
and relationships with external  
organisations

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**6. RECOGNITION**

Comments on recognition  
received / recognition programs  
and suggestions for improvements

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**7. PERFORMANCE APPRAISALS**

Comments on their usefulness,  
fairness, conduct

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**8. ORGANISATIONAL CULTURE**

Comments on management style,  
and overall culture

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**9. ANY OTHER COMMENTS**

## EXIT CHECKLIST

Checklist	
<input type="checkbox"/>	You have received from the departing employee all security access devices, including:
<input type="checkbox"/>	Swipe card
<input type="checkbox"/>	Keys
<input type="checkbox"/>	Computer equipment has been returned, including:
<input type="checkbox"/>	Laptop
<input type="checkbox"/>	PDA
<input type="checkbox"/>	Software
<input type="checkbox"/>	Other computer accessories
<input type="checkbox"/>	The government purchasing card has been returned.
<input type="checkbox"/>	Cabcharge card / vouchers has been returned
<input type="checkbox"/>	You have been advised of the employee's telephone pin, and any other relevant passwords
<input type="checkbox"/>	You have collected the employees checklist, and all items have been checked

Please sign and date this form and return it to HR.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_