# BPolicy

Date: 25.05.2021

Review Date: 17.08.2023

Leavers’ procedure

When a member of staff leaves the organisation there are various procedures that must be followed to ensure appropriate closure of all matters. The line manager, Local People Team (LPT) and the individual all have responsibility for completing the relevant tasks by the last working day.

The table below summarises the relevant responsibilities for each of the above groups, including links to the associated documentation.

## Summary of Responsibilities

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| **Line Manager** | |
| 1 | On receipt of resignation letter, scan a copy of the letter to the electronic staff file and follow the steps below to ensure DI is updated with a leave date which will send a notification to the LPT. In a redundancy situation the LPT will issue a redundancy letter but the remainder of this process is to be followed. |
| 2 | Email employee link to Leaver’s Survey. Explain that Barnardo’s asks employees who are leaving to comment on their experience of working for Barnardo’s anonymously by completing a Leaver’s Survey. Explain that feedback provided will help us to identify employment trends, and where necessary, introduce improvements that can benefit the wellbeing and working lives of employees in the future. |
| 3 | Offer employee the opportunity to go through their reasons for leaving as part of a leaver discussion (see pro forma) during a supervision/one to one meeting, or alternatively, there may be circumstances where it is more appropriate for this to be held with a member of the LPT, in which case notify LPT accordingly so that a date can be arranged. |
| 4 | Remind employee that Barnardo’s has legitimate business interests for processing personal data and one of these is to provide references when requested on current and former employees as set out in Barnardo’s privacy statement. |
| 5 | Calculate outstanding annual leave using the annual leave calculator spreadsheet which can be found on Barnardo’s Intranet or by checking My Place via the Leave Management screen, so that any leave due to be paid or recovered can be recorded during the termination process on Direct Input (including any additional annual leave purchased through the Buy Your Leave scheme). Discuss and agree with individual whether outstanding leave can be taken before end of notice period or will be paid on termination (or a combination of both). |

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| 6 | Advise service/section administrator to process the Staff Termination via Direct Input (manager must approve this within two weeks of processing and prior to payroll cut off deadlines to avoid overpayments). |
| 7 | If the member of staff has left immediately or payroll cut off has been missed, please contact payroll immediately to notify them so that payments can be stopped if necessary. (Email [payrollsupport@barnardos.org.uk](mailto:payrollsupport@barnardos.org.uk)) |
| 8 | Attach supervision notes, training records and any other documents held locally in shadow files to the electronic staff file and securely dispose of any duplicate paper file. |
| 9 | Discuss return of Barnardo’s car, if applicable, with individual and Transport Section to agree date. |
| 10 | If applicable, remind the employee that all outstanding invoices need to be actioned on the invoicing system (coded or approved, as appropriate) by no later than the last working day. |
| 11 | If applicable request return of corporate credit card (and any outstanding receipts) from individual by no later than the last working day and forward to the Senior Team Leader in Finance at Barnardo House. |
| 12 | Advise IS to cancel logins and, where applicable, 3G card, mobile phone, tablet, business telephone line and key fob. |
| 13 | Advise Payroll of any outstanding loans/floats to be deducted from final salary, e.g. car loan, season ticket loan, Cycle to Work Scheme, other salary exchange benefit agreements, Buy Your Leave scheme, sponsorship fees etc. (if the sum outstanding is more than the final, net of income tax and National Insurance, salary, Finance will contact the staff member to arrange repayment plan). |
| 14 | During one of the final supervision meetings, complete Leaver’s Discussion (see pro forma), or alternatively if preferred and considered more appropriate, this can be undertaken by a member of the LPT. |
| 15 | Ensure Leaver’s Checklist is completed during the last supervision meeting, or before. |
| 16 | Request return of all Barnardo’s equipment, where applicable, by no later than last working day e.g. security pass, keys, IS equipment e.g. \*mobile phone, tablet, laptop, desktop PC, SecurID fob, 3G card and any furniture/equipment provided for homeworking. Also ensure any confidential electronic or paper files, case notes, papers etc are returned to Barnardo’s or deleted/ shredded.  \*Ensure that employee has cleared Smartphones and tablets of their pin number and Google / iTunes accounts before they are returned to IS, see point 9 of employee checklist. If this doesn’t happen IS are unable to re-issue the device to another member of staff resulting in unnecessary cost to Barnardo’s. |

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| **Local People Team (LPT)** | |
| 1 | On receipt of DI Notification from line manager confirming a resignation letter has been received, send ‘Leavers Procedure’ letter\* (see Appendix 1) to employee confirming leaving date and detailing procedure to be followed, including Leavers  Checklist. (Also copy checklist to line manager).  \* Except for those who may have left Barnardo’s under different circumstances, including those who have been dismissed as a result of Barnardo’s procedures. |
| 2 | Contact employee to arrange Leaver’s Discussion, where requested. |
| 3 | In a redundancy situation where an ex-gratia amount is payable, advise the employee that if they are re-employed by Barnardo’s within two years of the date of redundancy, they will be required to repay part or all of the ex-gratia redundancy payment (see Redundancy FAQ’s). |
| 4 | Ensure, if relevant, that any salary change due to take effect prior to the employee leaving has been implemented from the appropriate date. |
| 5 | Contact the line manager to ensure supervision notes, training records and any other documents held by the manager in shadow files are amalgamated in the individuals staff file. |
| 6 | Move electronic staff file to closed area and refer to ‘Retention of Staff and Volunteer Records Guidance’ in the Confidential to People Workgroup. |

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| **Employee** | |
| 1 | Forward resignation letter to line manager. |
| 2 | Complete Leaver’s Survey at <https://www.surveymonkey.co.uk/r/2HZR9M6> |
| 3 | On receipt of confirmation letter from the LPT read through Leavers Procedure detailed in the letter and accompanying checklist. |
| 4 | Advise line manager and training provider of any booked training courses due to take place after leaving date to ensure they are cancelled or reallocated to a colleague if appropriate. |
| 5 | If applicable, in order to receive a refund of childcare vouchers, the [childcare credit request from](https://barnardosorguk-my.sharepoint.com/:w:/g/personal/sian_wilkinson_barnardos_org_uk/EeojYAGnOENBq3Fpi55HzKsBhlV-zpmlDpkAuMFEaCNz_A) should be completed and emailed to Payroll. |
| 6 | Discuss any outstanding loans/floats with line manager, if applicable, to ensure Payroll are advised accordingly e.g. car loan, season ticket loan, Cycle to Work Scheme, other salary exchange benefit agreements, Buy Your Leave scheme, sponsorship fees etc (if the sum outstanding is more than your final net of income tax and National Insurance salary, Finance will contact you to arrange repayment plan). |
| 7 | Ensure, if applicable, that all invoices are actioned on the invoicing system (coded or approved, as appropriate) by no later than your last working day. |
| 8 | Return corporate credit card, if applicable, to line manager no later than last working day along with any outstanding receipts. |
| 9 | Complete final i-expense claim if applicable. |
| 10 | Ensure return of all Barnardo’s equipment, where applicable, to line manager by no later than last working day e.g. security pass, keys, \*mobile phone/tablet, laptop, 3G card, SecurID fob and any furniture/equipment provided for homeworking. Also ensure return of any Barnardo’s files, case notes, papers etc.  \*Smartphones and tablets must be cleared of the pin number and Google / iTunes accounts before they are returned to IS and the charger must be returned with the device. If this doesn’t happen IS are unable to re-issue the device to another member of staff resulting in unnecessary cost to Barnardo’s. See [Returning equipment | Inside Barnardos](https://inside.barnardos.org.uk/resources-and-guidance/our-it/it-equipment/returning-equipment) on how to remove your iTunes or Google account from smart devices before returning them. |
| 11 | Speak to line manager to obtain a copy of training records from OLM if needed for future employment. |
| 12 | Ensure your actions on the checklist are completed by last day. |
| 13 | Discuss pension arrangements with relevant provider. |
| 14 | Print off any online payslips required no later than 3 months after leaving date as account will then be closed. |

*N.B. some of the above processes may vary in a redundancy situation*

## APPENDIX 1

**LEAVERS PROCEDURE LETTER (TO BE SENT VIA EMAIL) PRIVATE & CONFIDENTIAL**

Dear

## LEAVERS PROCEDURE

I am writing to confirm that I have received details that you have resigned from your role of XXXX and will be leaving Barnardo’s on XXXX.

The procedures to be undertaken prior to your departure are detailed below, giving contact names where appropriate on specific matters. A checklist is attached to assist you and your manager, who has also been sent a copy.

Please ensure that all matters are dealt with as quickly as possible as this will help to ensure that your final salary and P45 can be processed in good time.

## Leavers’ Survey

If you haven’t done so already, we would be grateful if you could take a few minutes of your time to complete Barnardo’s Leaver’s Survey, by clicking on the link below:

<https://www.surveymonkey.co.uk/r/2HZR9M6>

Your feedback is anonymous and we will use it to help us to identify employment trends, and where necessary, introduce improvements that can benefit the wellbeing and working lives of employees in the future. Please complete this as soon as possible but no later than your last working day.

**Leavers’ Discussion** At one of your last supervision meetings, your line manager will discuss your experience of working at Barnardo’s with you. Alternatively, a member of the Local People Team can discuss this with you, in which case please contact them so that this can be arranged, if this hasn’t been done so already.

## Future Reference Requests

One of Barnardo’s legitimate business interests for processing personal data is to provide references to prospective employers when requested on current and former employees as set out in Barnardo’s privacy statement: <https://www.barnardos.org.uk/privacy-notice>

## Forwarding address

If you have moved recently, and have not advised us - please provide your manager with the details to ensure all relevant paperwork including your P45 can be sent to your new address.

## Annual leave

If you have any outstanding annual leave owed to you (including any additional annual leave purchased through the Buy Your leave scheme) - please discuss with your line manager how you can take this before you leave. If it is not possible to take this before you leave, your manager will ensure that any leave due to be paid can be calculated and payroll advised accordingly. Any annual leave taken which is in excess of entitlement accrued to your last working day will be deducted from your pay. Any

payment owed for additional annual leave purchased through the HolidayPlus scheme will be deducted from your pay.

## Training Courses

Please arrange to cancel or reallocate any training courses that you are booked to attend by advising your line manager and the training section (or outside provider as appropriate).

**Childcare Vouchers**

If you participated in the childcare vouchers scheme, through Sodexo and wish to receive a refund on any unused vouchers, you can do this by completing the [childcare credit request from](https://barnardosorguk-my.sharepoint.com/:w:/g/personal/sian_wilkinson_barnardos_org_uk/EeojYAGnOENBq3Fpi55HzKsBhlV-zpmlDpkAuMFEaCNz_A) and then emailing the completed form to [payrollsupport@barnardos.org.uk](mailto:payrollsupport@barnardos.org.uk)

## General loans/float/Salary Exchange Scheme Loans

If you have any floats or loans e.g. car loan, season ticket loan, Cycle to Work Scheme other salary exchange benefit agreements, Buy Your Leave scheme, sponsorship fees etc the amount owing will be deducted from your pay, or if the sum outstanding is more than your final, net of income tax and National Insurance, salary Finance will contact you to arrange repayment plan. If you have any queries or questions on this please contact [payrollsupport@barnardos.org.uk](mailto:payrollsupport@barnardos.org.uk)

## Car loan

If you have a car loan with Barnardo's the amount owing will be deducted from your pay, or if the sum outstanding is more than your final, net of income tax and National Insurance, salary Finance will contact you to arrange a repayment plan. If you have any queries or questions on this please contact [payrollsupport@barnardos.org.uk](mailto:payrollsupport@barnardos.org.uk).

## Final pay slip/P.45

Your final payslip will be available online and your P45 will be sent by post. Online payslips can be accessed for up to 3 months after leaving Barnardo’s. Should you have any queries please contact [payrollsupport@barnardos.org.uk](mailto:payrollsupport@barnardos.org.uk)

## Barnardo’s Car

If you have a Barnardo’s car please discuss with your line manager and the Transport Section at Barkingside details about returning the car. This must be done no later than your last working day.

## IT Equipment

Any equipment belonging to Barnardo’s and allocated to you for work usage , e.g. laptop, mobile phone/tablet 3G card, equipment provided for home working etc,

belonging to Barnardo’s must be returned and checked off with your line manager no later than your last working day.

## Corporate Credit Card

If you hold a Barnardo’s corporate credit card please return this to your line manager no later than your last working day, including any pending receipts.

**Invoices**

If you have invoice coding or approving responsibility, please ensure that all invoices are actioned no later than your last working day.

## Other Property

Please ensure that all other property belonging to Barnardo's is returned by no later than your last working day. This includes your security pass and any Barnardo’s files, case notes etc where applicable.

## ID Card

If you have an ID card, it is vital that you return this to your line manager no later than your last working day.

## Expenses

Please ensure that you submit your last i-expenses claim in good time before you leave. For those who frequently travel, or need to claim expenses on a regular basis, your claim must be submitted no later than your last working day at

Barnardo’s.

## Pension

If you are a former member of the Barnardo’s Average Salary Section (BASS) and wish to discuss details of your pension, please contact Hymans on 0121 212 8188 or [barnardos@hymans.co.uk](mailto:barnardos@hymans.co.uk) for further details.

If you are a member of Barnardo’s Retirement Savings Plan (BRSP), Aviva will contact you at your home address. Aviva can be contacted directly on 0800 145 5744 or email [contactus@aviva.com](mailto:contactus@aviva.com)

If you are a member of another pension scheme please contact the relevant provider for information.

## Employee Assistance Programme (EAP)

The Employee Assistance Programme (EAP) is a confidential service for employees, which provides an opportunity to talk through any issues or concerns. This service can be accessed for up to three months following your leaving date with Barnardo’s. You can contact the EAP by calling 0800 030 5182, Minicom please email [counsellingadvice@healthassured.co.uk](mailto:counsellingadvice@healthassured.co.uk) or if calling from overseas +44 1455 254198. Also online at healthassuredeap.co.uk (username and password: barnardos) all available 24 hours a day, 7 days a week.

## Confidentiality

As a reminder, the written statement of your terms and condition of employment (your contract) sets out your duty of confidentiality to Barnardo’s under common law that applies both during and after your employment. You should be aware that you therefore still have a confidentiality commitment to Barnardo’s after you have left.

## Finally

I would like to take this opportunity on behalf of Barnardo's Trustees, Directors and colleagues to thank you for the service that you have given to Barnardo's.

I wish you well for the future and every success. If you have any queries please do not hesitate to contact me.

Yours sincerely

## AD People

***(xxxxxx Region/Nation) cc Manager***

## APPENDIX 2

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| **LEAVERS CHECKLIST** | |
| **TASK** | **DATE COMPLETED** |
| Line manager to arrange leavers process via Direct Input |  |
| Outstanding annual leave to be taken, paid or reclaimed as appropriate |  |
| Inform manager of new address (if applicable) |  |
| Complete Leaver’s Survey online: <https://www.surveymonkey.co.uk/r/2HZR9M6> |  |
| Training courses cancelled or reallocated |  |
| Childcare vouchers refund requested (if applicable) |  |
| Outstanding Loans/Float to be repaid (if applicable) |  |
| Outstanding Car Loan to be repaid (if applicable) |  |
| Outstanding additional (purchased) annual leave payment to be repaid |  |
| Complete final i-expenses claim (no later than last working day) |  |
| Discuss pension arrangements (if applicable) |  |
| Return Barnardo’s car (no later than last working day) |  |
| Return Barnardo’s IS equipment (no later than last working day) |  |
| Return other Barnardo’s property (no later than last working day)  including any homeworking equipment provided and any Barnardo’s files, case notes, papers etc |  |
| Return Barnardo’s ID card /Security Pass |  |
| Return Barnardo’s corporate credit card with receipts (if applicable) |  |
| Ensure all outstanding invoices are actioned i.e. coded or approved (no later than last working day, if applicable) |  |
| Manager to advise IS to cancel logins and if applicable, business telephone line |  |
| Print any online payslips required within 3 months of leaving date as account will then be closed |  |
| Print/copy training record from OLM. |  |