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Date: 31.01.24

Review Date: 31.01.27

Leavers’ Procedure

When a colleague employed by Barnardo’s leaves there are various procedures that must be followed to ensure appropriate closure of all matters. The line manager, People Team (PT) and colleague 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 the resignation, save to the colleague’s electronic staff file and follow the steps below to ensure D365 is updated with a leaving date. In a redundancy situation the People Team (PT) will issue a redundancy letter, but the remainder of this process is to be followed. |
| 2 | Email colleague the link to Leaver’s Survey: <https://www.surveymonkey.co.uk/r/2HZR9M6>. Explain that Barnardo’s asks colleagues 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 colleagues in the future. |
| 3 | Offer colleague the opportunity to go through their reasons for leaving as part of a leaver discussion (see [pro forma](https://inside.barnardos.org.uk/people-and-culture/managing-people/leavers-procedure)) 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 PT, in which case notify PT accordingly so that a date can be arranged. |
| 4 | Remind colleague 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 colleagues as set out in [Barnardo’s privacy notice](https://www.barnardos.org.uk/privacy-notice). |
| 5 | Calculate outstanding annual leave using the [annual leave calculator spreadsheet](https://inside.barnardos.org.uk/people-and-culture/taking-time/annual-leave-calculator) or by checking balances on D365 (including Recognition Day, if applicable and any additional annual leave purchased through the Buy Your Leave scheme) and ensure that you notify PT of any leave to be paid or recovered. Discuss and agree with colleague whether outstanding leave can be taken before end of notice period or will be paid on termination (or a combination of both). Advise colleague that any outstanding bank holiday should be taken, as there is no entitlement for hours to be paid on termination. If the colleague has a deficit of bank holiday entitlement and therefore hours are owing to Barnardo’s, then discuss options for how this can be rectified. |
| 6 | Process the Termination via D365 (**the manager’s manager must approve this prior to payroll close to avoid overpayments**). |
| 7 | If the colleague has left immediately or payroll close has been missed, please contact payroll immediately via the [Business Services Hub](https://hub.barnardos.org.uk/support/home) to notify them so that payments can be stopped if necessary. |
| 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 colleague and Corporate Transport Department to agree date. |
| 10 | If applicable, remind the colleague that all outstanding invoices need to be actioned on D365 by no later than the last working day. |
| 11 | If applicable, ensure that the colleague has actioned the return of corporate credit card in line with requirement in the [Card Holder’s Guidance](https://inside.barnardos.org.uk/sites/default/files/2023-10/RBS%20-%20Credit%20Card%20Holder%20Guidance.pdf). |
| 12 | Tell IS to cancel logins and, where applicable, 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. 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, the colleague will be contacted to arrange a repayment plan). |
| 14 | During one of the final supervision meetings, complete Leaver’s Discussion (see [pro forma](https://inside.barnardos.org.uk/people-and-culture/managing-people/leavers-procedure)), or alternatively if preferred and considered more appropriate, this can be undertaken by a member of the PT. A copy of the competed Leavers’ Discussion should be saved onto the colleague’s electronic staff file. |
| 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 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 colleague has cleared Smartphones and tablets of their pin number and Google / iTunes accounts before they are returned to IS, see point 10 of colleague checklist. If this doesn’t happen IS are unable to re-issue the device to another colleague resulting in unnecessary cost to Barnardo’s. |

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| **People Team (PT)** | |
| 1 | Ensure leavers report is run on a regular basis and send ‘Leavers Procedure’ letter\* (see Appendix 1) to colleague 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. |
| 2 | Contact colleague to arrange Leaver’s Discussion, where requested. |
| 3 | Ensure, if relevant, that any salary change due to take effect prior to the colleague leaving has been implemented from the appropriate date. |
| 4 | 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 colleague’s electronic staff file. |
| 5 | Move electronic staff file to closed area and refer to [Barnardo’s Records Retention](https://inside.barnardos.org.uk/sites/default/files/2023-06/Barnardo%27s%20Records%20Retention%20Schedule%20%28Open%20with%20Google%20Chrome%29.pdf) Schedule. |

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| **Colleague** | |
| 1 | Forward resignation to line manager. |
| 2 | Complete Leaver’s Survey at <https://www.surveymonkey.co.uk/r/2HZR9M6>. |
| 3 | On receipt of confirmation letter from the PT 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 via the [Business Services Hub](https://hub.barnardos.org.uk/support/home). |
| 6 | Discuss any outstanding loans/floats with line manager, if applicable, to ensure Payroll are advised accordingly e.g. 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, you will be contacted to arrange a repayment plan). |
| 7 | Ensure, if applicable, that all invoices are actioned on D365 by no later than your last working day. |
| 8 | If applicable, return corporate credit card in line with requirement in the [Card Holder’s Guidance](https://inside.barnardos.org.uk/sites/default/files/2023-10/RBS%20-%20Credit%20Card%20Holder%20Guidance.pdf). |
| 9 | Complete final expense claim via D365, 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 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 colleague 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 staff file 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/P60 required prior to last day of employment as account will then be closed. Personal email address to be provided to PT for final payslip and P45 to be sent. |
| 15 | Ensure your personal contact details are provided and up to date on D365. |

*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 colleagues in the future. Please complete this as soon as possible but no later than your last working day.

**Leaver Discussion** At one of your last supervision or colleague conversation meetings, your line manager will discuss your experience of working at Barnardo’s with you. Alternatively, a member of the 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>

**Personal Contact Details**

Please ensure that your personal contact details are provided and up to date on D365.

## Annual Leave & Bank Holidays

If you have any outstanding annual leave owed to you (including Recognition Day as applicable and/or 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 Buy Your Leave scheme will be deducted from your pay.

If you have an outstanding bank holiday balance, or you have taken hours in excess of your entitlement, please discuss this with your line manager.

## 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) sending the completed form to payroll via the [Business Services Hub](https://hub.barnardos.org.uk/support/home).

## General loans/float/Salary Exchange Scheme Loans

If you have any floats or loans e.g. 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 you will be contacted to arrange a repayment plan. If you have any queries or questions on this please contact payroll via the [Business Services Hub](https://hub.barnardos.org.uk/support/home).

## Final pay slip/P45

You will no longer be able to access payslips online after your leaving date. Your final pay slip and P45 will be emailed to your personal email address.

## Barnardo’s Car

If you have a Barnardo’s car, please discuss with your line manager and the Transport Department 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, 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 in line with requirement in the [Card Holder’s Guidance](https://inside.barnardos.org.uk/sites/default/files/2023-10/RBS%20-%20Credit%20Card%20Holder%20Guidance.pdf).

**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 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 colleagues employed by Barnardo’s, 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, for Minicom please email [counsellingadvice@healthassured.co.uk](mailto:counsellingadvice@healthassured.co.uk) or if calling from overseas +44 1455 254198. Also online at <https://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

## Strategic People Business Partner

***(xxxxxx Region/Nation)***

***cc Line Manager***

## APPENDIX 2

|  |  |
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| **LEAVERS CHECKLIST** | |
| **TASK** | **DATE COMPLETED** |
| Line manager to arrange leavers process via D365 |  |
| Outstanding annual leave to be taken, paid or reclaimed as appropriate |  |
| Outstanding bank holiday hours to be taken, or reclaimed as appropriate |  |
| Ensure personal contact details are provided on D365 |  |
| Complete Leaver’s Survey online: <https://www.surveymonkey.co.uk/r/2HZR9M6> |  |
| Completed Leavers Discussion to be saved onto the colleague’s electronic staff file |  |
| Training courses cancelled or reallocated |  |
| Childcare vouchers refund requested (if applicable) |  |
| Outstanding Loans/Float to be repaid (if applicable) |  |
| Outstanding additional (purchased) annual leave payment to be repaid |  |
| Complete final 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 (if applicable) |  |
| Ensure all outstanding invoices are actioned i.e. coded or approved (no later than last working day, if applicable) |  |
| Line manager to advise IS to cancel logins and if applicable, business telephone line |  |
| Print any online payslips required before leaving date as account will then be closed |  |
| Print/copy training record from staff file |  |

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| Document History | Date | Author | Comments | Approval |
| 1 | 31.01.24 | Policy and Advice Team | Updated to include D365, outstanding annual leave and bank holiday requirements and saving the leavers discussion into the ESF |  |