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University Health Board

Version: 7.2.3

WP60 Exit Interview Policy

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Responsible Dept / director:	People and Organisational Development			
Approved by:	Workforce Policies and Procedures Working Group – 15th December 2023 Deputy Director of People - DATE RemCom - DATE			
Date approved:				
Date activated (live):				
Documents to be read alongside this document:	WP5 All Wales Respect and Resolution Policy WP27 Guidelines for the fair treatment of disabled people in BCUHB WP43 Guidelines to Support Transgender Staff in BCUHB IG14 IM&T Security Policy			
Date of next review:	December 2026			
Date EqIA completed:	7 th October 2022			
First operational:	October 2017			
Previously reviewed:				
Changes made yes/no:				

N.B. Employees/workers should be discouraged from printing this document. This is to avoid the risk of out of date printed versions of the document. The Intranet should be referred to for the current version of the document.

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BCUHB EXIT INTERVIEW PROCEDURE AND QUESTIONNAIRE

1. INTRODUCTION

The Exit Interview is an invaluable source of information that enables the Health Board to assess the overall quality of work life within BCUHB and identify opportunities to improve retention and employee engagement.

The aims of this document are to help BCUHB maintain a high-quality working environment by giving managers an insight into the experience of staff working in their service area. This, in turn, can support staff retention and help to highlight areas for improvement. This also applies to all employees who resign from their post within the Health Board, regardless of whether they are leaving the Organisation/Divisions or transferring within departments.

Discussions with leavers should take place prior to a member of staff leaving the organisation. Managers should aim to arrange this as soon as possible after a member of their team either indicates their intention to leave BCUHB or formally offers their resignation. Leavers in turn should be actively encouraged to participate in the process. These discussions can provide a valuable insight to a member of staff's experience in their service / department and / or the organisation as a whole.

2. PURPOSE

- The purpose of the Exit Interview is to gather information from employees planning to leave the organisation or move division/team to a. explore whether an employee's reasons for leaving can be addressed whilst they are still employed by the Health Board thus removing the need to leave and b. inform and advise future recruitment and retention planning to ensure the Health Board offers an exceptional working experience for employees.
- Whilst the Exit Interview questionnaire is best completed via ESR so as to allow for the organisation to capture and best utilise the learning to be had from the staff member's experience, it is also good practice to organise a supplementary conversation between the staff member and their manager so as to also ensure learning can take place at the level of the particular service the staff member is exiting from.
- The information gathered will be used respectfully by Managers to explore working practices and the working environment within their departments with a view to adjusting and improving the work experience of employees.
- A leaver's discussion during the Exit Interview allows manager and employee an opportunity to explore answers in an open dialogue to fully understand the employee's points of view and explore their Individual work experience. The data generated is qualitative (whilst that of the ESR questionnaire is both quantitative and qualitative) and heard directly by the person undertaking the discussion allowing them to consider a potentially appropriate local response that may offset the decision to leave. Whilst it is important to manage

expectations at this stage, options available to explore can include, where locally appropriate and in alignment with service need:

- Flexible working arrangements
 - Liaison with local People Services around potential opportunities in other work areas within the Health Board
 - Secondment opportunities
 - Learning & Development opportunities
 - Utilisation of resources within the Respect & Resolution policy and framework in relation to work-base issues
- Key themes from discussions should be fed back to the People Business Partner linked to the service area concerned to inform departmental / organisational workforce action planning and ongoing retention work.
 - Leavers can also share their feelings/experiences during their Exit Interview. However, where this doesn't feel appropriate the leaver can seek advice via the WP5 All Wales Respect and Resolution Policy and Speak Out Safely on an alternative approach to share feelings/experiences in conjunction to completing an Exit Questionnaire.
 - Where the resignation is received from a member of staff who is moving internally, the manager is required to follow the same process as they would if the staff member was to leave the organisation. Upon concluding the meeting, a copy of the Exit Interview questionnaire is to be emailed over to Exit Interview mailbox where it will be recorded and used in conjunction with ESR Exit Interview reports.

3. AIMS

- To identify workplace, organisational or human resource factors that have contributed to an employee's decision to leave their employment with a department / BCUHB.
- To explore options and/or seek to resolve identified issues wherever possible, that could support the employee to stay within BCUHB as stated above in section 2, e.g. agree flexible working arrangements, arrange relocation to another area of work, consider secondment opportunities.
- To enable the Health Board to identify any trends requiring attention or any opportunities for improving our ability to respond to employee issues, allowing the Health Board to improve and continue to develop recruitment and retention strategies aimed at addressing these issues.
- To ensure the manager completes the leavers form in a timely manner and within 7 days of the individual giving their notice of resignation.

This policy covers the procedures to be offered when employees of the Health Board leave employment for whatever reason.

4. SCOPE

This policy applies to all employees of the Health Board. Normally, line managers / supervisors will conduct the supplementary Exit Interview conversation with employees. Where this is not an option the line manager/supervisor will arrange for their line manager to complete the interview. Individuals can request an alternative manager if required or a People Services representative instead. Individuals can choose to opt out of a face-to-face or MS Teams interview and instead just complete the ESR version from their notifications, or click this link here, to complete MS Forms which will be sent directly to the Exit Interview mailbox for input onto the individuals ESR, or a paper based version if they cannot access ESR. It is particularly important that this procedure be followed within difficult to recruit to areas, so as to understand the reasons behind any recruitment difficulties.

5. WELSH LANGUAGE STANDARD

In accordance with the Welsh Language Standards (i.e. the statutory duties that derive from the Welsh Language (Wales) Measure 2011), the Health Board now has a legal obligation to ensure that it doesn't treat the Welsh language less favourably than the English language in its dealings with both service users and staff.

Departing BCUHB employees may therefore complete the aforementioned Exit Interview questionnaire in either Welsh or English.

Furthermore, Line Managers must also provide employees with the option of conducting their supplementary exit interviews in Welsh. If the employee wishes to conduct the exit interview in Welsh, but there is not an appropriate Welsh-speaking staff member available to facilitate this, the Line Manager must arrange for a simultaneous translation service to be available during the exit interview, so the employee can communicate in Welsh (in accordance with their previously stated preference).

6. PROCEDURE

It is the responsibility of managers/supervisors to ensure all leavers have opportunity to complete an exit interview. Employees can seek advice from Trade Union representatives if required. The process should be commenced when the individual indicates their intention to leave or if this is not possible when they formally submit their resignation. Employee participation in the exit interview process is entirely voluntary but to be encouraged. If an employee agrees to an interview, the manager should make it an integral part of the employment leaver procedure. Early conversations with staff can have a positive impact on them wanting to stay in their role. Managers are encouraged to hold such conversations to explore and see what improvements can be made to support staff to continue in their role.

The line manager responsible for the person leaving will contact the employee if necessary in writing, inviting them to attend an Exit Interview conversation at a mutually convenient time. The leaver can agree to meet with their line manager or request to meet with a manager of their choosing to conduct the interview. Requests

to meet with a different manager will be actively explored in order to facilitate the process of the exit interview wherever possible and achievable.

The employee will be asked a standard set of questions (see ESR Exit Interview template in appendix 1), and given the opportunity to discuss any concerns or information they feel would be beneficial for the Health Board to know, regarding their employment experience in the organisation. The form that is used at the Exit Interview is designed to act as a guide for the interviewer in what should be a semi-structured interview; sections for handwritten comments are incorporated and additional information can be added on a separate sheet of paper where necessary.

There will be three suggested levels of responsibility in relation to deciding on who is best placed to facilitate the Exit Interview conversation.

- Level 1 – Where there are no known issues or concerns within the service – Line manager will proceed with Exit Interview (or other manager as appropriate)
- Level 2 – Where there is evidence of high turnover and potential issues or concerns within the department / ward / unit – it is suggested the Head of Service will conduct the Exit Interview
- Level 3 – Where there are high vacancies, high turnover and issues of concern within the department/ward/unit – it is suggested the Divisional Director or equivalent nominated senior manager will conduct the exit interview

In relation to levels 2 and 3, when in doubt as to which level to follow, advice can be sought from the People Business Partner responsible for a manager's particular area of work. If it is deemed that an independent party, external to the service or department, should undertake the Exit Interview, contact People Services for further advice.

If an employee chooses not to participate in a face-to-face or MS Teams exit interview conversation, managers should encourage the individual to complete either the ESR, MS Forms Exit Interview Questionnaire or a paper version of the Exit Interview Questionnaire themselves. The completion of MS Form will automatically be sent to Exit Interview Mailbox and paper copies can be scanned and then emailed directly to the following e- mail address:
BCU.WODExitInterviews@wales.nhs.uk.

The ESR Exit Interview questionnaire can be accessed via Your Notifications within the ESR system.

Once any MS Forms and paper-based forms are received via the Exit Interview mailbox, the Organisational Development administrative team will input the information onto the ESR Exit Interview module and analysis will be available via ESRBI Reporting functionality.

In conjunction with IG 14 IM&T Security Procedure, all Health Board staff are personally responsible for ensuring that no actual or potential security breaches occur as a result of their actions (section 6.6). If the individual wishes to leave the Health Board the manager must inform the member of staff that they must return all

Heath Board assets as detailed in IG14 Appendix 2 – Employee Leavers & Movers Checklist.

7. PARTICIPATION AND CONFIDENTIALITY

All employees are responsible for participating in the Exit Interview process, and it will be appreciated if answers provide are honest, candid and constructive.

BCUHB wants to strike a balance between confidentiality and making use of the information provided. To do this, it will keep to the law on General Data Protection Regulation which means the information will only be used for the purpose for which it was collected and it will be stored securely. BCUHB will ensure that access to the questionnaire data is strictly limited to the people for whom it is necessary. Only the People Services & OD teams will have access to the full dataset and provide high level thematic analysis for the purposes of organisational learning and improvement. In line with the General Data Protection Regulations (GDPR) the Exit Interview data will be kept for as long as necessary so we can support changes and improvements. It is anticipated this will be for no longer than five years.

8. REPORTING

Information gathered at exit interview will need to be recorded using the exit interview form available via ESR (also see appendices 1) and where done via a paper version, sent to the Organisational Development team to upload to ESR. This allows for analysis of the data for sharing with the People Business Partners across the Health Board and Heads of People Operations for dissemination to BCU Service areas allowing for monitoring to be undertaken into the effectiveness of employment practices and procedures. This analysis will be in respect of the reasons why employee leave the organisation or transfer in order to address any retention issues.

Appendix 1

INTRODUCTION

The exit interview is an invaluable source of information to assess the overall quality of work life within BCUHB and identify opportunities to improve retention and employee engagement.

The aim of these questions is to help BCUHB maintain a high-quality working environment by giving managers an insight into their service and department ways of working. This, in turn, will help towards improving staff retention and help to highlight areas for improvement

The exit interview is an important tool for us and discussions with leavers should take place prior to a member of staff leaving the organisation.

Managers should aim to arrange a discussion as soon as possible after a member of their team resigns and leavers should be actively encouraged to participate in the process.

These discussions can provide a valuable insight to a member of staff's experience in their service/department and / or the organisation as a whole.

If the member of staff prefers to complete these questions with another manager or by themselves that is acceptable also, the important factor is that an exit interview is undertaken.

We request that the following questions are completed by **ALL** employees who are leaving or transferring within the Health Board to complete and Exit Interview Questionnaire via ESR. In the exception the employee is unable to complete the Exit Interview Questionnaire via ESR please complete this form and return it via email to: BCU.WODExitInterviews@wales.nhs.uk

Appendix 1

Please complete in capitals where necessary, and circle all other appropriate boxes

Section 1

Surname (optional):		Forename (optional):		
Job Title		Department (optional):		
Base:		Assignment Number:		
Leaving date		Gender:		
Length of time in post	: 0-12months	1-5 years	5-15years	15+years
Length of time in BCUHB(incl predecessor):	0-12months	1-5 years	5-15years	15+years

Section 2

Are you leaving to take up another job/post?	Yes	No	
If 'Yes':	Same Role	Similar Role	Different Role
Where	Public Authority	Elsewhere	different NHS In a different department/division (state name)
Will your base change	Yes	No	
If yes, is it nearer home	Yes	No	
If yes, is this	Promotion	Same Grade	Lower Grade

Appendix 1

Section 3

What are your key reasons for leaving?

Retirement	Domestic	Health	Financial	Redundancy
Work related	none of these	please feel free to provide additional information below):		

Please answer (the following questions by circling the relevant answer

1	There have been frequent opportunities for me to show initiative in my role.	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
2	I have been able to make suggestions to improve the work of my team/department.	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
3	I have been able to make improvements happen in my area of work.	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
4	I often/always look forward to going to work.	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
5	I was often/always enthusiastic about my job.	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
6	Time often/always passed quickly when I was working.	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
7	Does the Organisation take positive action on health and well-being?	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
8	Does the Organisation act fairly in regards to career progression/promotion.	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
9	Does the Organisation provide opportunities for flexible working patterns?	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
10	I felt my contribution was valued by my team/ manager /Organisation?	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree

Appendix 1

11 What was your reason for leaving?

12 Is there anything that would have made you stay in your role in the organisation?

Section 4

Please indicate what you liked/disliked about the job:

1. Working for the NHS	Liked	Disliked
2. Working within specialty	Liked	Disliked
3. Working with your Colleagues	Liked	Disliked
4. Team Structure and Support	Liked	Disliked
5. Working with the Equipment/Technology	Liked	Disliked
6. Training and Development	Liked	Disliked

If you answered 'disliked' to any of the above, please give details below

Appendix 1

Section 5

Do you have any suggestions for improvement(s) to the job? If so, please give further information. If any of these improvements had been made would you have stayed in post?

Yes No Possibly

Please expand if you wish:

If 'Yes', then you are encouraged to discuss these issues with either your manager, next in line manager, or an alternative manager. If you prefer you can also speak in confidence to a representative of the People & Organisational Development Team, to arrange please email **BCU.WOExitInterviews@wales.nhs.uk**

Section 6

Did you have regular Personal Annual Development Reviews (PADRs)? Yes No

Section 7

For Leavers, and those who transfer within the Health Board who prefer not to complete an Exit Interview with a manager, then you will be asked to sign this section of the Exit Interview Questionnaire to confirm that you have been offered, and received the document. This part must then be emailed to the Organisational Development Team, email: **BCU.WOExitInterviews@wales.nhs.uk**

I have been offered an Exit Interview and prefer not to complete an Exit Interview Questionnaire.

Signature:

Date:

Name:

Date
:

I confirm that I have received the Questionnaire and will complete and return to the Organisational Development Team, email: **BCU.WOExitInterviews@wales.nhs.uk**

Appendix 1

Employee's Signature:

Date:

Manager's Signature:

Date:

People & Organisational Development, for audit purposes, will retain this information. Please note Managers and Staff representatives at joint focus groups will use the information provided from Exit Questionnaires. Whilst trends may be acted upon, all individual information will be treated in strictest confidence.

Thank you for your time