

“ The City of Heritage ”



ULUNDI LOCAL MUNICIPALITY

EXIT MANAGEMENT POLICY

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1. Policy Purpose

The policy ensures that all matters between the Municipality and the employee are suitably finalised when the employee's employment comes to an end. These procedures are to be followed whenever employees cease employment with the Municipality. The policy aims to achieve the following outcomes:

- All the relevant role players are informed of the procedures which follow the decision to terminate employment.
- HR management receives timely and complete advice which enables the efficient processing of the termination of employment and the accurate calculation of termination payments.
- Employees leaving the Municipality have the opportunity to provide feedback on the nature and organisation of their work.
- Procedures are put in place to review this feedback and consider its implications for municipal policies and procedures.
- Workgroup managers have more effective control over workgroup resources.
- Access to municipal systems and resources is controlled more effectively; and
- Employees leaving the Municipality are informed of and formally acknowledge their on-going obligations with regard to confidentiality and intellectual property rights.

The following apply to all situations where an employment contract between an employee and the Municipality is ended and includes the termination of employment through resignation, retirement, the completion of contract employment, permanent transfer to another government agency, or dismissal.

- To enable improved management of municipal systems and resources.
- To enable the Municipality to benefit from employee feedback.
- To improve the efficiency of the process of terminating employment.
- To ensure that all municipal equipment is returned and all financial obligations to the Municipality have been paid.

- To ensure that all outstanding payments due to the employee are appropriately calculated.
- To ensure that the employee has delivered all outstanding deliverables assigned on the due dates.

2. Policy Scope

This policy applies to all individuals employed by the Municipality and the relevant supervisors.

3. Definitions

The following definitions are applicable to this policy:

“Resignation” - a formal notification of leaving a paid or unpaid job.

“Interview” - a meeting during which somebody is asked questions, e.g. by a prospective employer.

“Record of Interview” - a transcript, report on, or recording of an interview.

“Notification” - to announce or report something officially, or make something officially known.

4. Legislative Framework

The following are applicable to this policy and where the content of the policy are misaligned the legislative prescript will prevail.

The Basic Conditions of Employment Act, 1997 (Act No.75 of 1997)

The Labour Relations Act, 1995 (Act No. 66 of 1995)

Compensation for Occupational Injuries and Diseases Amendment Act [Act 130 of 1993]

Local Government: Disciplinary Regulations for Senior Managers (Government Notice No. 344), as

published in Government Gazette No. 34213.

5. General Provisions

The following section provides elements required for a successful exit management process.

5.1 Resignation Notification

Employees are required to provide timely and appropriate written advice of their intent to terminate employment with the Municipality according to the conditions of employment specified in the acts, regulations and their employment contract.

Where a person's employment is to be terminated for any other reason, for example death or dismissal, HR needs to be aware of the relevant implications for the effective management of these procedures.

5.2 HR Management

All process related to the termination of service should be managed by the HR departments who should also be the custodians of relevant records on completion of the processes. HR should interact with all role players in the process and have a process in place to validate the information captured on the relevant forms by them.

5.3 Resignation Clearance Forms

Upon receiving a notification that an employee service will come to an end, HR should provide a clearance checklist to the employee. HR should develop and maintain the clearance form. The clearance form should list the relevant tasks that must be completed, whose responsibility it is and a task signoff area against each task to capture the signature of the relevant official, indicating that the task has been completed. The form should indicate the responsibility of each party.

The employee must collect all the required signatures from the relevant officials indicating that there are no outstanding matters.

The checklist also serves as a notification to the relevant official that the employee's service is being terminated.

5.4 Notification to Finance

HR should notify the internal finance department of the termination of employment and obtain assurance that all outstanding claims have been processed. Information regarding any unprocessed claims must be obtained and used during the final salary reconciliation.

5.5 Notification to Information Technology

HR should notify the head of the internal IT department of the termination of employment and obtain assurance that all IT equipment issued and assigned to the employee has been returned, and that the municipal data are returned.

5.6 Network and Hard Drive Files

The head of the IT Unit is to ensure that the employee's work and personal files are to be copied, moved and/or deleted as appropriate. Care needs to be taken that any required business files and records are retained and remain accessible. Files to check include:

- e-mail;
- shared, group and/or personal drives; and
- hard drives.

Emails received and replied to should be forwarded automatically to the supervisor for the remainder of the employee tenure.

Employee Access Control to IT Infrastructure must be limited to read and view only and right to delete must be removed.

A suitable final date for access to IT infrastructure should be determined on a case by case basis and agreed upon by the Supervisor, head of IT and Head of HR.

5.7 Security and Access

The following items must be returned upon receiving the notice of termination:

- access security card(s), swipe card(s) and/or keys;
- municipal name tag(s)/badge(s); and
- office, cabinet and/or safe keys.

5.8 Official Vehicle

The supervisor is required to ensure that all access to government vehicles is cancelled, paperwork is up to date, outstanding claims are lodged and reimbursements made. For example, this includes the return of:

- all car keys and remotes*;
- Owner's manual*;
- Service log book*;
- Travelling log; etc.
- Approved Vehicle Inspection report.

5.9 Notification to Supervisor

Upon the receipt of an employment-termination notification HR should inform the supervisor and head of the relevant departments accordingly.

Control processes linked to the employee's responsibility must be reassigned.

The supervisor should make a recommendation on the actions required on any outstanding deliverables and or work in progress.

The supervisor is required to arrange for any departmental files held by the employee to be returned information are to be copied and/or made accessible on the appropriate network(s).

5.10 Reconcile Leave Register

Upon receipt of the employee's resignation HR should reconcile the outstanding leave records of the employee to determine the leave balance.

5.11 Delegations Signature Authorisations

The employee's delegated authority must be terminated timeously and aligned with the specific instructions.

5.12 Other Departmental Resources

The workgroup manager is responsible for arranging the return or appropriate reimbursement for any other departmental resources issued or loaned to the employee. For example:

- library resources and loans;
- manuals, curriculum, policy and procedural documents;
- teaching materials, team resources and/or text books.

5.13 Office and Home Office Equipment

The HR is required to arrange for all office and home office equipment to be returned. For example:

- mobile phone and/or pager;
- home office equipment

5.14 Final Salary Calculations

HR should calculate the final salary and should include the following items as part of the final calculation;

- Reconciliation of all third-party deduction.
- Outstanding reimbursements.
- Final Income Tax deduction.
- Reconciliation of medical benefit contribution.
- Reconciliation of retirement benefit contribution.
- Any deductions relating to lost equipment, assets assigned to the employee or other outstanding financial obligations the employee might have towards the Municipality.

5.15 Exit Interview

It is important to ensure that employees leaving the department have the opportunity to provide feedback on the nature and organisation of their work, either through a written Exit Report or a face-to-face Exit Interview, which must take place before the last day of employment and be performed by HR.

This will enable the Municipality to have more effective control over resources and ensure that exiting employees are informed of and formally acknowledge their on-going obligations with regard to confidentiality and intellectual property rights.

Feedback received via either of these methods must be reviewed and considered in relation to departmental policies and procedures.

5.16 Exit Report / Interview

The HR Manager is to provide each employee who is leaving the Municipality with the Employee Exit Report that will be discussed during the Exit interview. The employee is to be invited to

complete the report and present it during the exit interview. Any reports completed by employees are to be kept by HR to determine if further action requires escalation to the appropriate management level. The HR Manager will conduct the exit interview.

5.17 Ongoing Obligation

Employees leaving the Municipality are informed of and formally acknowledge their on-going obligations with regard to confidentiality and intellectual property rights.

5.18 Employee Clearance Checklist

The employee will complete the official clearance checklist of the municipality and will obtain the relevant signatures from the departmental official that indicates that the resignation is acknowledged and that there are no outstanding matters between the employees and the various departments.



Exit Interview Questionnaire

Name:

Department:

Position:.....

Interview Date:.....

1. Reason for leaving

- Why did you begin looking for another job?

.....
.....

- If you could change anything about the organization, what would you choose?

.....
.....

- **Did you voice your concerns to anyone else at the municipality?**

.....

2. Employee Experience

- Did you think your work goals and responsibilities were clear?

.....

- Did you feel you had all the resources you needed to do your best work here?

.....
.....

- What did you think of the way you were managed?

.....
.....

- Did you receive frequent, constructive feedback from your manager and peers?

.....
.....

- What benefits or programs did you feel were missing from the municipality? How would you describe the culture of the municipality?

.....
.....

- What did you appreciate most about working here?

.....
.....

- Is there anything we could have done to make you want to stay?

.....
.....

3. Looking Ahead

- What are the biggest risks for Ulundi Municipality that you see?

.....
.....

- What advice would you like to give to your team? To the executive team?

.....
.....

- What would make this a better place to work?

.....
.....

- Would you ever consider working here again? Would you recommend others apply for a position here?

.....
.....

Signature.....

Date.....