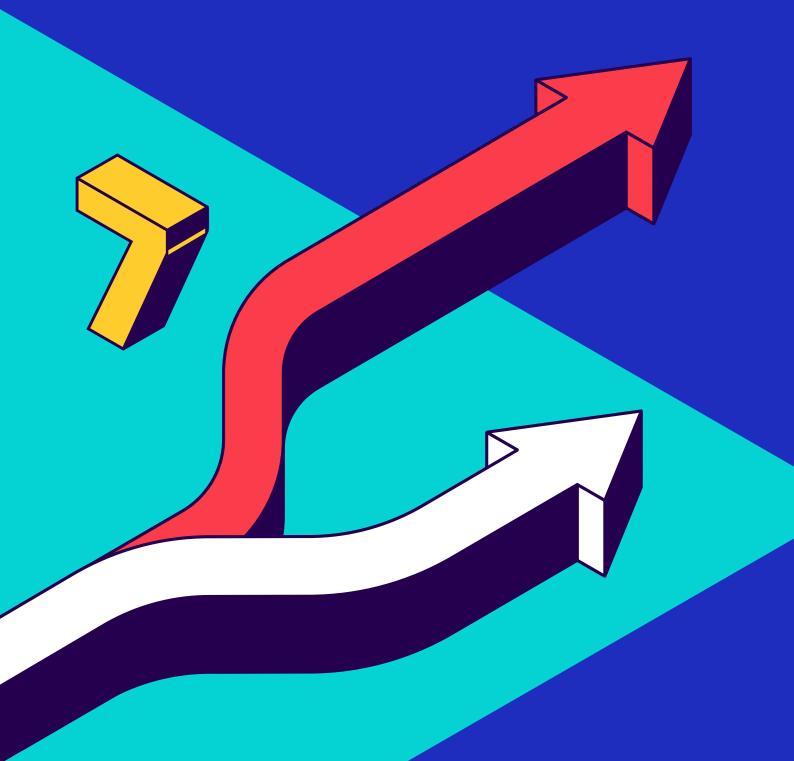


Human resource management: A manual for employer and business membership organizations

Tool 7: Separation practices



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Tool 7: Separation practices

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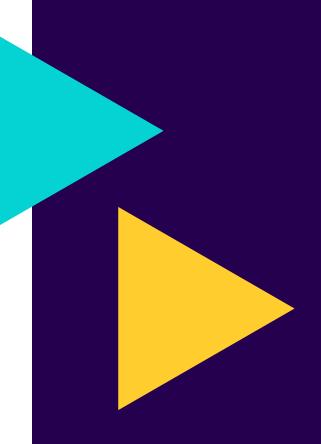
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Foreword

This manual – consisting of seven stand-alone tools – aims to assist employer and business membership organizations (EBMOs) to transition towards more structured, formal and strategic governance measures. The manual contains useful information on the business of human resource management and related best practices for EBMOs, based on real-world examples. Although this publication is not intended as a resource for EBMOs to use in providing guidance to member companies, some of its content can be used for this purpose.

Human resource management bridges the gap between an organization's staff and its executive administration. It enables organizations to tackle human resource issues strategically, supporting them to attract and retain talent and assisting their leaders and employees to adapt to organizational change. Human resource management has a critical role in managing staff and helping EBMOs work effectively and creatively, thereby allowing the organization to better support its members and achieve its mission.

A successful EBMO requires human resource management that is committed to the progress and growth of the organization and the services it provides to its members. Best practices in managing human resource, including practices that adopt a culture of diversity and inclusion, are fundamental for EBMOs, particularly because they should set an example to those they serve and represent. Additionally, an EBMO's board of directors (or executive committee) and secretariat should help identify structural barriers or exclusionary criteria and then help find solutions for eliminating them.

Having a manual of human resource management is also considered a best practice. Thus, this manual encourages human resource teams to pull from it applicable and contextualized portions to create or refine their own manual for better managing the staff within their EBMO.

This tool 5 was produced to assist EBMOs towards improving their productivity and impact by optimizing the effectiveness of their staff development and training practices. The tool discusses the requirements for a policy on training and development, the methods for determining training needs, implementing training for staff and leaders in the organization and how an engaged workforce enhances motivation and organizational performance.

The tool also offers guidance for informing the development and enhancement of human resource policies in an EBMO and for providing technical support to member companies where an EBMO provides this type of service.

The primary audience for this tool is the EBMO's chief executive officer, senior management and human resource officers. But the language used and guidance offered are also designed to make the information relevant to all EBMO staff members.

Each tool includes additional resources (checklists, templates, examples and/or guidance) that can be adapted by an EBMO when customizing it to their individual needs or for inclusion in their own human resource management manual.

Introduction to the manual

The theory behind human resource management is that staff who are provided with effective administration can more efficiently and productively contribute to an organization's direction, thereby ensuring that it achieves its goals and objectives. Human resource management covers a spectrum of components for creating, managing and cultivating the employer-employee relationship and includes both strategic and comprehensive approaches to managing people, the organizational culture and the workplace environment.

In practice, the role of human resource managers (or the executive with that function) in an employer and business membership organization (EBMO) is to ensure that its most important asset – its human capital – is nurtured and supported through the creation and management of programmes, policies and procedures and by fostering a positive work environment through effective employee–employer relations.

The International Labour Organization's (ILO) Bureau for Employers' Activities recommends that this human resource management manual be adapted and maintained by an EBMO's executives and human resource managers. This manual's intent is to educate and guide the chief executive officer, human resource officers and senior management to a high level of strategic success and achievement in accordance with best practices. The manual an EBMO produces (or updates) should contain relevant information, policies and procedures as a tool to facilitate the improved understanding of good governance, legal obligations and better practices as they relate to managing the organization's human resource.

Each of the seven tools that constitute this manual provides definitions, explanations and resources to improve the management of the human capital within an EBMO. The content also may be of value to EBMOs looking to assist member companies towards improving their human resource management. For an overview of EBMO services in the field of industrial relations and human resource management, please refer to *The Effective Employers' Organization*, a publication from the ILO and its International Training Centre.

The content of this tool is based on relevant best practice at the time of its preparation and was developed with input from the ILO's Employers Specialists working in all regions and from EBMOs of all sizes. The manual takes into account best practices and guidance from human resource industry bodies as well as the practical guides on building and managing an EBMO more strategically and effectively that the ILO's International Training Centre has created.

This publication is not exhaustive. Thus, readers are encouraged to consult the cited resources to improve their knowledge in areas of particular importance or relevance and to adapt the information provided according to the needs and requirements of their particular EBMO and to the legal framework of the country in which the organization operates.



WARNING: When creating strategies, policies and procedures, specific terms and conditions need to be reviewed and updated by an EBMO to reflect actual obligations under national legislation and regulations, contracts of employment or other industrial instruments relevant to each jurisdiction.

How to use the manual

This human resource management manual consists of seven tools, each with its own checklists, examples, templates and other resources. Each tool breaks down a human resource management function, as the table highlights. Collectively, the tools have two purposes: (a) to remind (or inform) human resource officers and upper management of an EBMO of the best practices in managing all staff members of the organization and (b) to offer guidance to EBMOs for developing their own internal guidance in these different areas.

Tool 1. HRM in the organization – Fundamentals

Tool 2. Staffing and recruitment

Tool 3. Benefits and compensation

Tool 4. Performance management

Tool 5. Development and training

Tool 6. Employee relations

► Tool 7. Separation practices

First, refer to the definitions and abbreviations section in each tool (located at the back, before the additional resources) to become familiar with the terms commonly used in human resource management, governance and organizational management processes.

Second, review the main portion of each tool, which will take you through the basic elements of a specific function of human resource management. Where possible, examples are included to bring clarity on how to approach drafting and implementing a process, strategy or policy. Take what you need from this section for your own internal guidance for managing human resource (or even the employee handbook) and adapt it to your EBMO and jurisdiction.

Following the various prompts



This mechanical signal highlights advice, guidance or direction to a relevant link.



This magnifier leads to further guidance in the additional resources section.

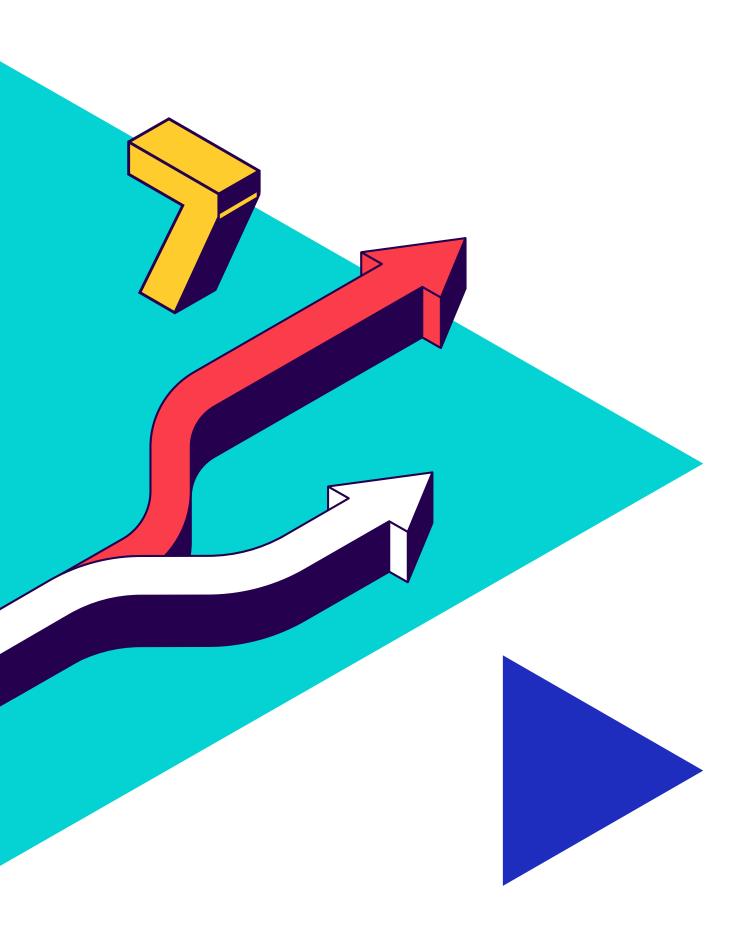


This pointer suggests possible content for your own human resource management manual.

Third, review each tool's additional resources section. The first checklist is a prompt for producing organization-specific documentation, policies and other information for your own human resource management manual. Where applicable, the additional resources include templates and guides for EBMOs to use. Make sure your documents are relevant, up to date and complete – this is important for the validity and accuracy of implementing human resource management functions and ensuring legal compliance.

Fourth, consult the ILO for additional online resources relevant to the tool or subsections for further advice and guidance.

Fifth, as with this manual, the human resource management manual that an EBMO produces ultimately should be a living document, updated as policies and procedures change. Thus, it is best to present your EBMO manual in a loose-leaf format, which will allow pages to be separated or added as required. Ideally, if technology and competency permit, the organization should consider producing an electronic version and printing only when necessary.





Separation practices

This seventh and final tool can assist EBMOs towards optimizing their separation processes and practices. It discusses the need to have a separation policy that responds to the multiple reasons why staff may leave the organization, how to manage the processes of dismissal, retrenchment and retirement and the importance of conducting exit interviews.

Tool 7 also offers guidance for informing the development and enhancement of separation policies in an EBMO and for providing technical support to member companies where an EBMO provides this type of service. This section also can help in either compiling or updating a human resource management manual and the employee handbook.



Key points

- Understand your legal obligations and implications fully before progressing with the separation of an employee from the organization.
- A good offboarding process can enable important data to be collected and minimize disruption to productivity in the organization.
- Poor offboarding processes can impact other staff members and cause reputational damage to the organization. It can increase the risk of legal claims related to termination.
- ▶ Whatever the format of an exit interview, it is a worthwhile benefit of the separation process.

Separation as a process

Separation of employment is not necessarily positive or negative, nor does it necessarily entail conflict of some sort. There are many reasons for an employee to exit an organization. Even when connected with grievance or poor performance, separation of employment is typically a last resort for when all other efforts have failed. The relevance of this tool 7 flows directly from tool 4 on performance management, which links to the termination of employment "with cause". Regardless of the circumstances for an individual leaving their employment, it is important for EBMOs to have a policy and a plan in place to manage the process.

Separation policy

Separation of employment refers to the event whereby an employee ceases to be part of the organization's workforce. A clear employment separation process is beneficial to all parties by preventing any potential misunderstandings or distrust from arising between the employee and the organization.

It is important that any time an EBMO terminates the employment of an employee, the employee receives the same attention and treatment as any others who have left for the same reason.

A separation policy ensures that the EBMO is in compliance regarding any safety or legal concerns. It is the best way to ensure that the organization is taking every opportunity to maintain good relations with departing staff.

A separation of employment policy applies to all prospective or current staff of the organization in regards to possible separation of employment.

The following outlines the elements of a separation policy: termination, legal obligations to staff, offboarding and exit procedures.



Resignation and retirement

Resignation

Resignation is the termination of employment initiated by the employee, whereby an employee voluntarily decides to end their employment and clearly communicates this decision to the employer.

When an employee resigns, they must give written notice via a letter or an email to their employer. The notice period starts the day after such a notice in writing is given and ends on the last day of employment.

An employee's employment contract, enterprise agreement or other registered agreement sets out how much notice (if any) the employee is obligated to give when they resign and if an employer can withhold benefits if the employee does not give the minimum notice period.1

EBMOs should manage employment resignation in a way that minimizes the impact of the loss of the employee on the organization's workflow and work environment. If handled effectively, the exiting employee will leave knowing they have contributed and added value to the organization.



Beware the heat of the moment!

If a resignation appears to occur "in the heat of the moment", an employer should consider allowing a reasonable time to pass before acting on the resignation or should confirm the employee's intention to resign after some time has passed.

An organization may want to offer a higher salary or better benefits to induce an employee to stay. However, it must be mindful of the precedent that this will set to avoid potential accusations of discrimination.

If the employee is not meeting the expectations of their role, a resignation could be beneficial to the organization, which would not have to initiate a layoff or dismissal process. However, the organization still needs to treat a departing employee with courtesy and respect.

¹ In some countries, even if the contract says that benefits can be withheld, the law forbids deductions from employee entitlements, especially in relation to statutory benefits, such as wages and other statutory allowances.

Retirement

Discussions of retirement with a staff member can be risky for the organization. Staff cannot be forced to retire because of their age, unless required by law to do so. An employer who asks an employee to retire is showing evidence of age discrimination.

To draft a succession plan, an EBMO may need to start a conversation with older staff about their retirement plans. However, the EBMO should be careful to avoid any conversation that may seem to encourage or expect retirement from the older staff.

If an older employee is less productive, slowing down or appearing to put less effort into their work, the behaviour should be managed from a performance and conduct perspective and not associated with age.

All staff should be held to the same standards of performance and conduct – standards that need to be consistent for all staff, regardless of age. The EBMO's relevant policies on performance, job descriptions and the code of conduct should be used as guides.

The concept of voluntary retirement is an early retirement incentive that is offered to eligible staff members who meet certain criteria. EBMOs may use this form of retirement to reduce their workforce without conducting layoffs. It allows their staff to move into retirement at an earlier age while also helping the organization to manage development.



Dismissal of an employee occurs when the employer terminates the contract (with or without giving notice), or the employee leaves (with or without giving notice) in circumstances in which they are entitled to do so because of the employer's conduct.

Where dismissals cannot be avoided, it is vital that EBMOs comply with their own procedures as well as the relevant laws and the code of practice.

Suspension and/or dismissal can have a significant detrimental impact on any individual, and immediate and ongoing support should be considered to safeguard their health and well-being.



Plot out the risks of ending someone's employment

When considering bringing a staff member's employment to an end (for any reason), a risk matrix may be useful. An employer should always balance the risk of a claim with the risk of an employee remaining employed or behaviour going unchecked. As with any risk, the way it is mitigated or treated is pivotal. Generally, when employment ends, the best mitigation strategy is to follow a thorough and legally compliant process.

Summary dismissal

This can often be legally referred to as summary termination for breach and repudiation. When an employee has committed a serious breach, the employer may have the right to elect to terminate their employment with immediate effect. This right is different to a right the employer might have under a term of the employment contract to terminate for serious misconduct.

The most widely accepted breaches – though subject to national laws and practices – that allow the organization to dismiss an employee on the first offence include theft, vandalism, fraud, acts of violence or a serious breach of occupational safety and health. In some jurisdictions, sexual harassment now constitutes serious misconduct warranting summary termination of employment.

Dismissal for cause

4

This form of termination at the initiative of the employer is generally used for either employee underperformance or inappropriate behaviour that is not considered serious enough to justify summary dismissal.

If an employee's conduct is unacceptable but not serious enough to justify immediate dismissal, it is the employer's responsibility to manage the issue of conduct or underperformance in a fair, reasonable and defensible manner.

Dismissal process

- 1. The first step of any disciplinary or termination process should be an informal counselling session with the employee to ensure they understand what relevant standard is expected by the employer, how their behaviour falls short of that standard and what action might be taken to rectify the situation (see tool 4).
- 2. The organization should provide written warning to the employee, stating that their conduct will put them at risk of dismissal if it does not improve.
- 3. It is not enough to simply tell the employee that their conduct or performance is not good enough. The employer should clearly explain the issue, hear the employee's explanation or perspective and then provide them with clear steps on how they can improve.
- 4. After this first warning, the organization should allow the employee the opportunity to improve their conduct over a reasonable period of time, providing additional support, training and resources as necessary.
- 5. Best practice when deciding whether or not to terminate an employee's employment (or maybe even when deciding to issue the warning) is to give the employee opportunity to "show cause". This involves informing the employee that a preliminary decision has been made to terminate their employment but before a final decision is made, the employer wants to hear from the employee regarding the proposed outcome and to provide any additional information that might be relevant to the employer's decision.
- 6. If the agreed time has passed and the employee's conduct or performance has not improved or the employee has not responded to the "show cause" opportunity, the organization may have reasonable grounds to give the employee notice of their dismissal.
- 7. During any of these discussions, the employee is allowed to have another person present to assist. But the role of a support person is to provide personal and moral support to the staff member and is not, however, to provide advice or to advocate on the staff member's behalf. The support person should not participate in the meeting other than in supporting the staff member. Their role is strictly that of an observer, and they should not speak on behalf of the staff member. (A lawyer could attend as a support person but should not act in their usual role as an advocate and should not speak for the employee. It is important in these setting that the employer hear from the employee directly.)
- 8. The EBMO is responsible for making sure that the process is carried out comprehensively and that the correct documentation is completed. These documents can include a statement of termination and/ or a termination letter, a signed witness statement and a "show cause" letter. The EBMO must ensure that the reason for termination is recorded in writing and that the employee is given a termination letter articulating the rationale for termination.
- 9. Unpaid wages or entitlements owed to the employee must be paid out in full.
- 10. If an employee submits an unfair dismissal claim against the organization, the organization must provide evidence that shows it was in compliance with relevant codes or legislation. Accepted forms of evidence include copies of written warnings.



In a dismissal, ensure appropriate assistance to the employee!

In the series of steps in the dismissal process, the employer should ensure that appropriate support and assistance are provide to the employee and to other people involved in the process. This might entail reminding the parties of the employer's "employee assistance programme" (if any) or reminding them of the availability of free counselling services. At a minimum, employees should be given a contact point with the employer whom they can reach out to if they need support or have questions, which is typically the human resource team.

Retrenchment

A retrenchment or redundancy occurs when an organization genuinely ceases to require the employee's job to be performed by anyone because of changes in the operational requirements of the business or funding cuts, as can be the case for EBMOs.



Redundancy procedure

A redundancy procedure will vary according to the timescale and size of a redundancy programme, but EBMOs should consider following these steps.

- 1. Plan. Try to avoid redundancies and consider alternative approaches, such as stopping overtime, retraining or redeployment. Or offer staff sabbaticals and secondments, pay freezes or short-time working.
- 2. Identify the pool for redundancy selection. This must be identified carefully but will usually consist of at least one among those who undertake a similar type of work or those who work in a particular department or at a relevant location or those whose work has been reduced or is expected to be.
- 3. Seek volunteers. Offering a voluntary redundancy package and seeking volunteers may avoid compulsory redundancies.
- 4. Consult staff. Employers are required to consult individual staff members and give them reasonable warning of impending redundancy. Legal obligations are different in every location and will detail the consultation process, timeframe and information to be provided to staff.
- 5. Use selection criteria for redundancy. Choices must be based on objective criteria such as length of service (only as one of a number of criteria), attendance records, disciplinary records, skills, competencies and qualifications, work experience and performance records.
- 6. Consider alternative employment options. Employers must consider offering suitable alternative work to redundant staff.
- 7. Communicate about separation. An employer should give written notice to staff members selected for redundancy that they are "at risk" of redundancy and invite them to individual meetings. Once the individual consultation is complete, the employer must decide whether the employee is to be made redundant and give a written redundancy notice, which may be covered by a statutory minimum notice period. An appeal by the employee should be allowed.
- 8. Provide a redundancy payment.
- 9. Provide counselling and support. Immediate and ongoing support should be available to the individual to safeguard their health and well-being. A well-designed redundancy programme should enable staff to redraft their curriculum vitae and mount an effective job search.

There are several essential elements for EBMOs that can lay the ground for a fair and respectful redundancy (and restructure).

- ▶ **Eliminate or reduce uncertainty.** To reduce the impact of stress on an organization's staff members, it is important to provide as much information to them as possible. This might include timelines, financial advice, access to entitlements and options for redeployment.
- ▶ Understand and manage staff facing redundancy. Understanding the emotional impacts that staff members being made redundant may be experiencing and having strategies and resources to support them are crucial. The EBMO can support staff by listening to concerns raised by staff and referring them to other resources where possible. It should ensure an environment of calm and respect at all times and not make promises it cannot keep. The EBMO must communicate that it is the job that is being made redundant, not the person.
- Look after the staff who are left behind. It is common for there to be increased turnover among remaining employees, often linked to the emotional state of those left behind and potential ongoing uncertainty that major restructures can create. To minimize this turnover and look after remaining staff, organizations should keep everyone informed of the process, be honest about job security and manage staff workloads and stress levels. It should ensure that training is provided where remaining staff have new roles to cover for redundancies or restructuring. It must listen to the concerns of remaining staff members.
- ▶ Bear in mind that EBMOs are differently placed than companies in the case of redundancies. Companies may not be able to adjust their product or marketing strategies during a crisis that requires retrenchment. In the case of an EBMO, it should provide an opportunity for the staff to address the cause of retrenchment if it can be done, especially in drafting a contingency plan for new services and membership expansion. It may be possible for EBMOs to outsource their own staff to member companies (human resource, investor relations, legal specialists) to increase revenue.

Offboarding

Offboarding covers the actions an organization takes that are necessary, legally required and proper to sever the employer-employee relationship. This process spans the period from the decision to end the employment relationship to the last interaction an employee has with the employer.

Offboarding in the EBMO is essential for many of the same reasons as the onboarding process:

- It has an effect on all levels of the organization, from the executive to human resource, individuals and members.
- It involves short- and long-term outcomes that can affect organizational health and performance.
- It is an opportunity to strengthen the organization's brand and credibility.



Can offboarding go wrong?

A good offboarding process can provide valuable insight from the departing employee, minimize the disruption for remaining staff and improve the chances of word-of-mouth recommendations.

Conversely, a poorly thought-out offboarding process increases the chances of mistakes and adds stress to an already stressful event, which can be felt via productivity and difficulty in recruitment. If poorly executed, it can lead to a legal claim related to discrimination. Correctly calculating the termination notice must be done with reference to the relevant local laws.



Best practice

Best practices in the offboarding process focus on the values and culture that exist in the EBMO and should focus on the following priorities.

1. Maintaining relationships

It is important that the organization strives to preserve a positive relationship with departing staff and takes the opportunity to remind all staff - including those who are remaining on board - that the organization cares about them and values the contributions they make.

Making relationship maintenance part of the employee offboarding process can improve engagement and loyalty in staff and increase the likelihood that they will recommend the organization to colleagues. Best practice in this case could take the form of a gift, a farewell event or a sincere thank you from the chief executive officer and board of directors (or executive committee). Whatever is done, it should centre on how the EBMO would like staff to feel when they look back on their time and experience at the organization.

2. Organizational health

This is about minimizing the disruption of an employee's departure and using their parting thoughts to improve the organizational culture. Minimizing disruption can be as simple as keeping involuntary offboarding as short as possible to ensure that there is no loss of productivity or knowledge. Tasks like shadowing, redelegation of responsibilities and redistribution of existing work are the responsibility of the employee's manager, so it is important to involve all relevant staff in offboarding programmes.

The exit interview is part of organizational health because it provides an opportunity to gain insights into organizational areas, such as culture, values and other qualitative measures.

3. Risk management

In the context of offboarding, risk management refers to anything the EBMO must do to safeguard itself from a corporate security and legal liability standpoint. It includes measures such as blocking account access, disabling key cards and reaffirming non-disclosure agreements. Risks can be defined as security risks (physical property access and data management) and legal risk (loss of intellectual property and talent and avoiding liability that could result in legal action by a terminated employee).



See the additional resources section for an offboarding checklist.

Exit interviews

Exit interviews can be a difficult human resource management task. Because of this, some organizations choose not to conduct them. Regardless of why an employee may be leaving the EBMO, they may not feel comfortable in telling the whole truth. However, exit interviews can still provide important insights into why a staff member or volunteer is departing, and these insights may help the EBMO improve staff retention and human resource practices.



Best practice

The following highlights practical suggestions to maximize the benefits to the EBMO from the exit interview process.

Be well prepared

- ▶ Before conducting the interview, review the employee's resignation letter as well as anything else from their work history that might be relevant, such as written warnings, performance review reports, their contract and the position description.
- Discuss with the employee's direct supervisor (if that is not you) whether they have anything to contribute that may not be on record.
- Like a job interview, use this information to formulate some specific questions for the outgoing employee, making sure the questions are broad and open-ended to prompt the raising of issues and concerns that the organization may not be aware of.
- Do not overload the interview with questions that may cause the employee to feel rushed in answering.

Maintain professionalism

- If an employee is leaving under difficult circumstances, it can be a challenge to remain objective and professional. It may be that an outgoing employee will be critical of the EBMO and a natural reaction to criticism is to be defensive, but defensiveness is rarely productive.
- ► To keep the interview on track, stick to prepared, specific questions and refrain from responding to complaints or being drawn into emotional debates just listen.
- ▶ If appropriate, have a second person sit in on the interview to provide a different perspective.
- If appropriate, offer the employee the opportunity to bring someone to sit in with them so they feel less intimidated.

Listen

- ► The golden rule of any interview is to listen more than you talk. If an employee is leaving under difficult circumstances, it is important to give them uninterrupted space to voice concerns, even if the EBMO completely disagrees or thinks that what they are saying is unfair to the organization or their manager.
- ▶ If it is not clear why an employee is leaving, it is possible they will not be willing to pinpoint exactly which set of circumstances has resulted in their resignation. This means active listening is necessary to try and identify when the interviewee might be holding back and gently drawing out useful information from them.
- ▶ Do not try to fill the silence give the interviewee time to think about what they want to say before answering.
- ▶ Start off by being general and then become specific. Ask an open-ended question and listen to the answer before deciding if more information is required by a more targeted question.
- Listen for cues that an employee is uncomfortable with the questioning. If the question is not going anywhere, move on.
- Do not try to respond to accusations even if the EBMO disagrees with what has been said.

Provide options for feedback

- A face-to-face exchange is the best option for conducting an exit interview and shows that the EBMO genuinely cares about the outgoing employee's opinion and is willing to give up time to listen to them.
- Other options for an exit interview where an employee cannot, or will not, attend an interview in person can include an online survey, email or a more informal discussion over the phone.

Review and act

- In whatever way an EBMO decides to conduct an exit interview, it must be remembered that the information learned is only useful if it leads to positive change.
- A period of time should be spent on reviewing the feedback that has been given, with the following questions in mind:
 - ▶ How much of it is constructive and useful?
 - ▶ How much of it is the employee simply not being the right fit for the role?
 - ▶ Are there any short-term changes the EBMO can make for an instant benefit?
 - ▶ Are there long-term lessons that the EBMO should be learning based on the interviewee's experiences?
- Utilizing the answers to a feedback review, initiate action. A first step might be to plan how to make use of the information:
 - Should it be communicated to staff?
 - ▶ Should it be noted for the organization's management processes or practices?
 - Should recommendations be made to amend organizational policies?
 - ▶ Should the feedback be used as input into longer-term strategic changes to management or human resource management?



See the additional resources section for an exit interview template.

Definitions and abbreviations

ACTEMP	Bureau for Employers' Activities, which is a specialized unit within the ILO.
Code of conduct	A document produced by an employer that establishes the broad expectations of employee behaviour, usually reflecting the values and goals of the business. It can broadly cover the whole workforce of a business or be specific to certain roles or positions. NOTE: The code can form part of the employment contract and be legally enforceable by the employer. But this must be a decision that an EBMO makes due to their specific situation. Thus, policies, such as a code of conduct, are more in the character of "lawful and reasonable direction", which can be amended from time to time. Otherwise, not using this structure creates the risk that policy matters must be dealt with as a breach of contract rather than a disciplinary issue. And any amendment to a policy is also an amendment to the contract of employment, which may require the expressed agreement of all parties to the contract.
Conflict of interest	When a person's personal or commercial interests conflict with their professional duties.
Discrimination	A bias and/or unfair treatment that occurs when a person or a group of people is regarded less favourable than another person or group because of their background or certain personal characteristics. In some jurisdictions, discrimination will have a technical legal definition.
Diversity	Characteristics that make us humans unique, such as our cognitive skills and personality traits, along with factors that shape our identity (for example, race, colour, age, gender, religion, disability, sexual orientation, cultural background).
ЕВМО	Employer and business membership organization, which is the target audience of this manual.
Employment relations	The facilitation, management and analysis of the relationship between employers, staff and representative groups such as trade unions.
Exit interview	The final meeting between management and an employee leaving the organization, at which information is gathered to gain insights into work conditions and possible changes or solutions and the employee has an opportunity to explain why they are leaving.
HRM	Human resource management, which is the practice of administering policies and programmes that optimizes employee performance and advance an organization's business goals. The programmes include employee recruitment, training, compensation, benefits and professional development.

HR manager	Human resource manager, which is the person who leads and directs the routine functions of recruiting and interviewing staff, administering pay, benefits and leave and enforcing company policies and practices.
ILO	International Labour Organization, which is part of the United Nations system.
Job description	Document providing an overview of the tasks, duties, responsibilities, qualifications, competencies and experience required for a particular role.
KPIs	Key performance indicators, which are measurable values that demonstrate how effectively an organization is achieving organizational objectives and upon which the performance of employees is evaluated (for example, sales per month, customers served and units manufactured).
KSAs	Knowledge, skills and abilities, which are the proficiencies and competencies required for a particular position or role.
Offboarding	A process that leads to the formal separation between an employee or board member and the organization through resignation, termination or retirement.
Organizational culture	The beliefs, morals, mission and attitudes shared by the organization and its staff.
OSH	The protection of workers' lives and physical well-being through elimination or control of risks in the working environment or the system of work within which workers operate.
Performance review	A formal assessment of an employee's work performance that identifies their strengths and weaknesses, provides feedback and sets goals for future performance. Performance reviews are also called performance appraisals or performance evaluations.
Retrenchment (or redundancy)	A special form of separation from service that occurs when an employer needs to reduce the size of its workforce.
Separation	Severance of an employment relationship. The action to separate from employment may be taken by an employee, the employer or both.
Staff	Persons contracted to work for an organization (or business) in return for compensation. Staff are differentiated from other workers, such as contractors, in that they are an integral part of the organization, which has the legal right to dictate the conditions, hours and manner of work performed.
Staff retention	The organizational policies and practices that are designed to encourage staff to remain employed by the organization.

Strategic plan	How an organization defines its purpose and goals beyond the immediate future and the actions set forth to achieve those goals.
Succession plan	A plan that focuses on identifying staff with competencies who could advance to particular positions within an organization.
Turnover	When referring to employees, a turnover rate is the measurement of the number of employees who leave an organization during a specified time period, typically one year.
Unfair dismissal	Termination by the employer of an employee on grounds that are unfair or without legitimate reason.
Violence and harassment	In the context of work, both terms refer to a range of unacceptable behaviours and practices, or threats thereof, whether a single occurrence or repeated, that aim at, result in or are likely to result in physical, psychological, sexual or economic harm. It includes gender-based violence and harassment.
Workplace environment	Encompasses the physical conditions as well as the mental demands, social aspects and support levels between colleagues and management.

Additional resources for tool 7

This section offers checklists and a template for an exit interview to help EBMOs learn from departing employees and maintain harmony in and learn from a dismissal process. This section also can help in either compiling or updating a human resource management manual and the employee handbook.

Where you see "[EBMO]", "[purpose]" or "[xxx]", the idea is for you to insert the name of your EBMO or the appropriate phrasing if you decide to adapt this resource to your own human resource management manual.

Checklist for producing the human resource management manual

As the next step to producing a human resource management manual for your EBMO, this checklist can
be used to compile the basic documents that should be included.
☐ Prepare the EBMO's separation policy

☐ Prepare the EBMO's offboarding process

Checklist for an employee exiting the organization

This checklist can be used when an employee is leaving the organization to ensure that all necessary steps have been taken and thus to help create a smooth and pleasant separation.

Employee departure checklist

Staff member leaving:	Position:
Date leaving:	Department:
Replacement required (Y/N):	Manager:

Responsible	Details	Done
HR Representative	 Book exit interview, if required. If employee is on a visa, contact Department of Home Affairs. Ensure that employee has provided an updated address for any further correspondence. Establish whether replacement is required. 	
Finance	 Company credit cards are returned. All outstanding monies have been reimbursed. Social Security administration completed. 	
IT	 IT equipment returned, such as laptop, mobile, wireless device and IT account disabled as soon as practicable. Arrange manager's access to user's email account for any follow-up emails needing action. Voicemail message changed and password reset. 	
Employee	 Letter of resignation provided. Outstanding work handed over. Company-owned property returned. Work area left tidy and all personal items removed. Final timesheet submitted (if applicable). Clients advised of new contact (if applicable). 	

Exit interview template

This template can be used when interviewing a departing employee to learn, if not already known, their reasons for leaving and their view of the workplace, both the positives and the negatives. This response is extremely useful for identifying weaknesses in the organizational structure and for highlighting the strengths, all of which is important for making future decisions.

Employee interview details			
Employee:		Manager:	
Position:		Interview date:	
Department:		Date leaving:	
Interview conducted by:			
Reasons for leaving			
☐ Career opportunity	☐ Difficult work	relationships	Closer to home
☐ Higher salary	Career chang	e	☐ Personal reasons
☐ Job security	☐ Workplace cu	llture	Other (please specify)
☐ Better benefits	☐ Better work-l	ife balance	
The job			
What did you most like about yo What did you most dislike about			
What would you change about t	he role?		
Do you feel that you had the ned what was needed?	essary resources	and support to e	nable you to do your job? If not,
Did you have clear goals and kno	ow what was expe	ected of you in yo	ur role?
Were your skills used effectively	in your role?		
Were the job responsibilities and	d expectations cor	nveyed accurately	during the interview process?

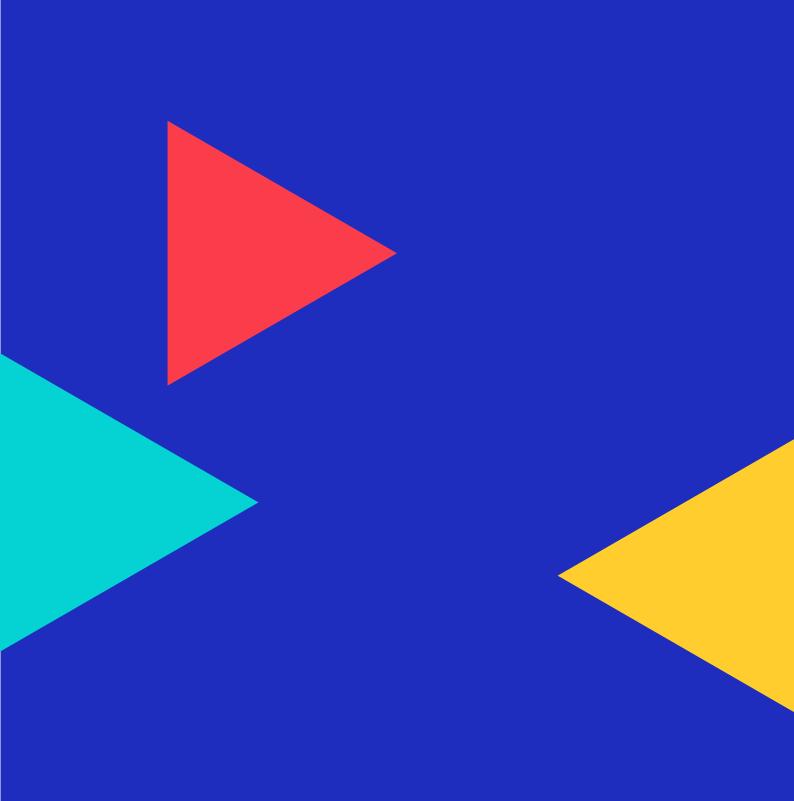
The Manager
How would you describe your relationship with your manager?
What could your manager do to improve their management style and skills?
Did your manager have sufficient knowledge and understanding of your role?
Do you feel your manager recognized and acknowledged your strengths and achievements in the role?
Did your manager provide constructive feedback?
The Organisation
Was the induction process positive, helpful and did it provide all necessary information to enable you to do your job?
What did you enjoy about working at [EBMO]?
What did you dislike about working at [EBMO]?
Do you believe that [EBMO] was a positive and supportive environment to work in? Why or why not?
Did you clearly understand and feel a part of the accomplishment of [EBMO's] vision and values?
Do you believe that [EBMO] has the appropriate facilities and resources available to enable staff to fulfil their roles effectively?
Describe your experience of [EBMO's] commitment to quality and customer service.

Do the policies and procedures of [EBMO] help to create a well-managed, consistent and fair workplace in which expectations are clearly defined?
Do you have any suggestions as to how [EBMO] can improve?
Remuneration and Benefits
Was the salary commensurate with the responsibilities of the job?
Do you believe that work–life balance was promoted and practised at [EBMO]?
Were the organizational benefits and other rewards and recognition efforts adequate?
Other
Other Is there anything the organization could have done to change your mind about leaving?
Is there anything the organization could have done to change your mind about leaving?
Is there anything the organization could have done to change your mind about leaving? Would you consider working for [EBMO] in the future?

End the meeting on a positive and polite note.

Commit to using the information provided to improve the work environment.

Wish your employee success.



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