

TEMPLATE! DON'T USE THIS TAB / ONLY FOR DUPLICATING

☑	AREA	TASK	LEAD	SUPPORT	DEADLINE	LINKS	NOTES
<input type="checkbox"/>	PLANNING	Agree exit buddy from team	Team				
<input type="checkbox"/>		Setup Exit planning shared folder	Buddy	Exiting worker			
<input type="checkbox"/>		—Add template exit docs, and create exit tasks tab (in here!)	Buddy				
<input type="checkbox"/>		Fix leaving date, share with team	Buddy	Exiting worker			
<input type="checkbox"/>		Assess capacity: do we need to recruit?	Buddy (w. Team)				
<input type="checkbox"/>		Organise exit planning meeting	Buddy				
<input type="checkbox"/>		Share Exit planning doc	Buddy			Template link	< template, copy before use
<input type="checkbox"/>		Draft exit plan for review by team (& partners if appropriate)	Exiting worker				
<input type="checkbox"/>		Discuss exit support needs (loose ends? adhoc 121s? leaving do? etc.)	Buddy & Exiting worker				
<input type="checkbox"/>		Explore future working scenarios, e.g. Associate	Buddy & Exiting worker	Exiting worker & team input			
<input type="checkbox"/>	HR	Organise exit interview	Buddy			Template link	< template, copy before use
<input type="checkbox"/>		Carry out exit interview	Buddy			Template link	< template, copy before use
<input type="checkbox"/>		Prepare exit interview notes for team (with consent)	Buddy	Exiting worker			
<input type="checkbox"/>		Organise a leaving do	Buddy	Team			
<input type="checkbox"/>		Organise a present and a card	Buddy	Team			
<input type="checkbox"/>	COMMS	Inform team	Buddy / Exiting worker				
<input type="checkbox"/>		Inform project & working partners, funders, etc	Exiting worker	Team			
<input type="checkbox"/>		Flag to team which key contacts they suggest doing handover comms with	Exiting worker				
<input type="checkbox"/>	WORK	Handover planning, with support/input from team	Exiting worker				
<input type="checkbox"/>		Handover time with successor for any areas of work	Exiting worker				
<input type="checkbox"/>		[Add as appropriate]	Exiting worker / ...				
<input type="checkbox"/>	LEGAL etc.	Check holiday leave and final pay	Relevant worker				
<input type="checkbox"/>		Remove from any legal / governance roles (e.g. Companies House)	Relevant worker				
<input type="checkbox"/>		Remove from payroll & send P45 (if PAYE)	Relevant worker				
<input type="checkbox"/>		Remove bank access	Relevant worker				
<input type="checkbox"/>		Remove accounts software access	Relevant worker				
<input type="checkbox"/>	TECH	Return any organisational stuff/equipment (if appropriate)	Exiting worker				
<input type="checkbox"/>		Close Google Workspace account	Relevant worker				
<input type="checkbox"/>		- Agree email access grace period	Relevant worker				
<input type="checkbox"/>		- Setup email 'out of office' responder	Relevant worker	Exiting worker			
<input type="checkbox"/>		- Transfer ownership of Google Drive files and folders	Relevant worker				
<input type="checkbox"/>		- After grace period, change p/w	Relevant worker				
<input type="checkbox"/>		- Remove subscription	Relevant worker				
<input type="checkbox"/>		- Remove from chat spaces	Relevant worker				
<input type="checkbox"/>		- Remove from calendars	Relevant worker				
<input type="checkbox"/>		- Update Groups to remove leaver email (team@)	Relevant worker				
<input type="checkbox"/>		Remove / update bio on website (as appropriate)	Relevant worker				