



- Board Members
- Business Taxes Committee
- Customer Services and Administrative Efficiency Committee
- Legislative Committee
- Property Tax Committee
- Other [Insert Name]

Topic:

EXIT QUESTIONNAIRE/INTERVIEW POLICY AND PROCESS

Background:

At the March 28, 2001 Customer Services and Administrative Efficiency (CS&AE) Committee meeting, the Executive Director was requested to provide a status report of the Board's Exit Questionnaire and Interview Policy and Process at the July 31, 2001 meeting. Following is a short history of the policy and process.

- In 1993, the Equal Employment Opportunity (EEO) Office assumed responsibility of the exit questionnaire/interview policy and process from the Personnel Management Division (PMD). The change in responsibility was a decision by then Executive Director, Burt Oliver. At the time, Board management had received input from numerous employees who wanted to complete an exit questionnaire, but they were not sure how to obtain one or what process to follow. From that point forward, the staff of the EEO Office shared the then current policy and process with the Employee Advisory Committees and requested their input. An article was also published in the *Boardcaster*, and an all-employee memo was distributed to notify Board employees of the transition and how they could obtain a questionnaire and/or arrange for an interview.
- In 1995, the EEO Officer and staff determined that the exit questionnaire and interview process and policy needed to be revised because the form was limited in scope. Staff conducted extensive research, including contacting other State agencies and private entities for input. A revised process, questionnaire form, and policy were developed and have been in place since 1997.
- In 1999, a consulting firm was hired to conduct an internal organizational health survey. At that time, the Executive Director's Group recommended that one of the responsibilities for the consultants should also be to develop a new exit questionnaire for the Board to implement. Unfortunately, no funding remained in the contract for the consultants to develop an exit questionnaire, since all funding had been expended for the organizational health survey. In the meantime, the EEO Office continued to provide the existing exit form for employees who were leaving the agency. The 1997 version of the exit questionnaire and confidential envelopes were distributed to all Board Managers, Supervisors, and Attendance Coordinators for employee use. The EEO Office also made the questionnaire available and conducted and/or arranged interviews for any employee who made a request.

Current Status:

Staff is in the final stages of producing a revised exit questionnaire form and process. Major changes and improvements have been made to the exit questionnaire form. A revised policy has been developed and staff is working to streamline the process for data collection. Managerial reports will be generated quarterly. Previously, only employees who left the Board by retirement, transfer, termination or rejection on probation completed the questionnaire. The proposed process also allows employees who are transferring or promoting between Board units to complete the questionnaire and/or interview. The process continues to be voluntary and participants may also choose to remain anonymous.

The purpose of the Employee Exit Process is to obtain employees' input regarding agency working conditions and employment policies, practices, and/or procedures. Information obtained will be used to meet the Board's ultimate goals with respect to increasing employee retention and enhancing the work environment. It will also be used for statistical purposes.

CONCLUSION:

After the final approval process has been completed, staff will:

- Submit the documents to the Forms and Publications Section for final formatting.
- Develop and distribute a memorandum to all Board employees, informing them of the new policy and procedures, and prepare an article for the January 2002 *Boardcaster*.
- Place the exit questionnaire form on *eBoe*, the intranet, to make it more accessible to Board employees.
- Establish a data collection and tracking system.
- Revise BEAM Section 1770 to reflect the new policy and process.
- Prepare a final status report for the March 2002 CS&AE Committee Meeting.

Prepared by: Taxpayers' Rights and Equal Employment Opportunity Division – EEO Office

Current as of: July 18, 2001