Conducting Exit Interviews- How organizations can benefit!
By Judith Brown, Director of Research

Research has shown that a person who resigns from your organizations is leaving for one of three possible reasons: a new career opportunity, an unsolicited job offer or for a grievance that has not been handled correctly. When a person resigns from your agency for voluntary reasons, it's normally a surprise, and it can be expensive to replace a valuable team member.

An exit interview process will help you and your organization understand why people leave and give clues as to where some improvements need to be made. An interview process that also offers closure is both healthy and productive prior to an employee's departure.

The primary purpose of the exit interview has always been the resolution of unresolved and/or outstanding concerns of both the employer and employee. One of the primary reasons for the interview (sometimes just done in questionnaire form) has often been to determine the actual reasons for the individual's resignation. Some managers might question the purpose of the interview, since most employees do not burn bridges, and are often less than truthful in the reasons for leaving. Does that mean that the exit interview is of little value? Well, sometimes yes, but very often the employee is quite candid in his or her responses.

On a very practical note, routine employment matters can be addressed at the interview. Unresolved concerns can be as simple as, the continuation of insurance benefits, vesting in retirement plans, communication, and of course getting back a company vehicle, pager, cell phone, and other property of the organization.

Taking a more positive view of the exit interview, this is also the time when many employees are willing to point at deficiencies in the organization, i.e., "poor management or supervision," "complete lack of supervision and support," "poor communications," etc. An organization that is honest with itself will use these responses to look into the claims and make corrections where the allegations are found or known to be true.

At the same time, let us not forget that some employees move on for very legitimate reasons in no way related to their tenure with the organization. They may have changes in career interests, or they or their spouse might be moving out of the area, or a commuting problem that did not exist when they joined the organization may have become unmanageable.

Not often, but by no means rare is the revelation that the employee has had a problem for several months which he or she could not resolve, remained quiet, and decided that it was better to "switch than to fight." If the employee is "worth saving," this is an ideal opportunity to relate the organization’s "dispute resolution" procedures, quite often allowing the individual a way to express grievances which can indeed be resolved. It is cheaper to retain a potentially or proven good employee than to find a replacement.
It may also be a time when the organization finds that it has been remiss in addressing the problem and if a new procedure or better communication can resolve the conflict, there is still time to retain the employee. The action that the organization takes to improve deficiencies, can certainly make the organization a better place to work for present and future employees. However, be careful not to promise a resolution which will not take place. Such promises may become contractual and, if the individual is giving up an opportunity with another organization, your organization may well be liable if a resolution is not reached or a necessary and "warranted" procedure implemented. (Do not use terms such as "guarantee" or even "will" unless you are absolutely certain that steps will be taken to resolve the situation.)

One hurdle that must be overcome in almost every situation is to insure that, no matter what the employee says, there is no retaliatory action for his or her perceptions of the "truth." Not only might such retaliation be illegal, but also such reprisals become "public knowledge" quickly and one may well undermine any good that comes from the exit interview and all future interviews.

A few "rules" regarding the interview. First, the exit interview should be voluntary. The information collected must be disseminated only to those who need to know. The employee should be allowed to request another person be present: if the interview is normally conducted by the HR manager, and the employee wants the department head or even the head of the organization, and it is possible, do it. Also, maintain the exit interview in a separate file from the employee’s personnel folder.

PREPARING FOR THE EXIT INTERVIEW
As you begin to review your exit interview process, look for trends that might point to deeper problems or might help you see new opportunities. Here are some trends to look for:

· Average length of employment,
· Top three reasons why people leave,
· Top three positions with the most turnover,
· Look for turnover patterns within a specific department or group, and
· Be sure to examine what you are doing on a personal level to prevent future resignations.

CONDUCTING EXIT INTERVIEWS
The next step is to determine how the exit interviews are going to be done in your organization. Here are some typical ways to conduct an exit interview:

Create a form to be filled out before the interview or to be mailed back after the employee leaves, or conduct a verbal exit interview, either in person or on the telephone.

Note: Create a custom exit interview form for your organization and then create a summary of the findings. From this summary, begin to address the internal areas that will either reduce employee turnover or make for a more productive and profitable organization.
Creating exit interview questions

Creating custom exit-interview forms are the best approach. Here are some sample questions:

- What did you enjoy the most about working for the engineering department?
- What did you enjoy the least and why?
- What suggestions or feedback can you share that would make our organization stronger and more successful?
- Did we handle your complaint/grievance in an appropriate and timely way?
- Was your career path and future within our organization made clear to you?
- What would it take for you to stay, if that were possible?
- Is there anything else you would like to share as your final comment?

Note: Remember, if exit interviews are handled respectfully, you and your organization will gain a wealth of knowledge. In addition, a departing employee will more than likely offer honest commentary about what is and what is not working in your organization. Are you ready to really listen to what they have to say? More importantly, are you ready to take the action steps to resolve, fix and improve whatever is necessary?

Getting the most out of the interview

- Inform the exiting employee of your desire to collect information that could help improve working conditions.
- Ask if the employee prefers talking with you (if you are the supervisor) or someone else, such as another human resources person or a line manager.
- Ask the employee to discuss any issues that would be useful to you or the organization. Tell them that the information will be kept confidential.
- Schedule the meeting during the last week of the person's employment.
During the Interview

If the interview is being conducted face-to-face, hold the interview in a neutral place. Your office may be intimidating. Consider having an exit luncheon for someone who has been a valued employee. Arrange the physical layout to promote a problem-solving discussion rather than a boss-subordinate interview. Sit next to the employee rather than opposite him or her. Listen without being defensive. Record the details. Get as much information as possible by covering:

- Your perception of your own leadership and interaction with others in the department;
- Any job difficulties you were not aware of;
- Things the person enjoyed about the job;
- Any corporate policies and procedures that prevented the person from doing the job effectively or caused annoyance;
- Any other information the person feels you should know.

If the employee is vague, prod with specific open-ended questions. For example, "Could you give me an example of that?"

Find out about the employee’s new job. This information could give you ideas about what is wrong now. You might ask:

- What attracted the individual to the job?
- How the new work environment will differ?
- How salary and benefits compare?

Conducting Exit Interviews with Discharged employees

Exit interviews are also useful when dealing with discharged employees, to avoid the possibility of lawsuits. The most troublesome exit interviews can be with discharged employees. Vincent Dicarlo, a Sacramento lawyer in an article “How to avoid employee lawsuits: the exit interview” (Sacramento Business Journal) offers these tips:

- It is best to have at least two managers at such an interview in case there is a dispute about what went on.
- First, tell the departing employee that the organization has decided to terminate his/her employment due to unsatisfactory performance, tardiness, failure to follow instructions, reduction in force or other specific reasons approved by your lawyer. You should always be able to document a factually solid, sensible reason, regardless of whether the employment was at-will.
· Even if you don't consult your lawyer every time you fire an employee, you should ask about any reason that is not on the list above. Don't fire someone for a reason that is improper or that can easily be made to look suspect.

· Remind the departing employee of your previous discussions, if any, concerning the problems for which he is being terminated. Tell him, if applicable, that as a result of the lack of sufficient improvement in the relevant areas, you cannot continue his employment.

· If you are offering the employee a severance package that contains releases of liability (and you should), tell him that you are willing to offer him a severance agreement that would give him certain benefits. Then give the employee your standard termination letter, the severance agreement, and the usual COBRA notices.

· Give the employee the booklet from the state Employment Development Department (or its equivalent) on unemployment benefits. If you don't have this, you can get it from EDD or your lawyer.

· Listen carefully and patiently to what the employee has to say, especially including any complaints he may have. If the employee disagrees with the reasons for his/her termination, ask the employee why, and later consider what response may be appropriate, perhaps in consultation with your lawyer. Do not argue with the employee. Simply say that you are sorry that you do not agree with the employee and are surprised at any untrue statements that he/she may make.

· Ask the departing employee whether he/she has any documents belonging to the organization, including lists of clients, and arrange for their return. Remind the employee that he/she has a continuing obligation to maintain the confidentiality of the company's business after his/her departure. Make arrangements for the employee to remove his/her personal belongings at your mutual convenience.

· Ask whether the employee's records relating to compensation are up to date. These might include records relating to leave taken. Make arrangements for a check to be issued for all accrued compensation, including any salary, leave time, vacation time and commissions. If there is any disagreement about compensation, tender the amount that you believe you owe, and offer to get back to the employee as to any disputed amount.

**Note:** Some things, while not necessary, probably won't get you in trouble. For example, it is OK to express regret that things did not work out well enough. It is also OK to remind the employee of any efforts you made to help him or her to meet your requirements. You may wish him or her good luck.
Other things are not OK, and may expose you to litigation. Do not argue with the employee. It is useless, creates bad feelings and may cause you to say something that you will heartily regret hearing repeated in court.

Don't say or suggest that the departing employee is incompetent or dishonest. This is important; such statements may form a basis for tort liability for defamation.

Do not suggest that the amount or timing of payment for accrued compensation depends on whether he signs the severance agreement.

Don't promise the employee anything else, such as a good recommendation or help in getting another job. If someone asks for a good recommendation, you should consult with your lawyer about what your policy should be.

Do not give a false reason for the termination or deny the true reasons. People sometimes are tempted to do this out of a misguided desire to avoid hurting the employee's feelings. Resist that temptation.

If anything unanticipated or troublesome comes up, or the employee accuses you or a fellow employee of some kind of improper behavior, discrimination or harassment, postpone any response until you have had a chance to carefully consider the information, perhaps in consultation with your lawyer. Don't try to improvise a response.

Remember, a carefully structured, well-thought-out exit interview can ensure that you end the employment relationship without unnecessary hard feelings, and help to keep you out of court. It should be part of every employer's regular practice.

The following are samples are examples of exit questionnaires and procedures followed by other organizations.
Exit Interview Suggestions

(These are just ideas, you should select those questions that seem most relevant for the situation.)

Introduce by letting employee know that we want to continuously improve the work experience within OAHRM and their thoughts and ideas would be appreciated.

_ What was the driving factor in your decision to leave?
_ What was the best part of working within OAHRM?
_ What was the worst part of working within OAHRM?
_ Did you find the projects on which you worked interesting and/or challenging?
_ Do you think your skills were well used?
_ Did you have sufficient development and growth opportunities?
_ What suggestions do you have for improving the work experience within OAHRM?
_ Is there anything I, as your sub-team lead, could have done differently to improve your experience?
_ Is there anything you wish you had known before you took the job?
_ Would you recommend OAHRM to others as a good team on which to work?
_ Would you consider returning to BAH at some point? To OAHRM?
_ Is there anything else you would like to add that we haven't discussed?
EXIT INTERVIEW

Job Title_________________________________ Last Day Worked______________

Briefly explain your reason for leaving: _____________________________________________
____________________________________________________________________________

Which of the following were important in influencing your decision to leave? (More than one may apply.)

_____ Job Duties _____ Salary _____ Fringe Benefits  
_____ Working Conditions _____ Supervisor _____ Conflict with co-workers  
_____ No Advancement Opportunities _____ Returning to School _____ Moving  
_____ Career Change _____ Health _____ Family Circumstances  
_____ Commuting Distance _____ Retirement _____ Other (please specify)

Add any additional comments about your choices here:
____________________________________________________________________________
____________________________________________________________________________

What suggestions would you make for improving the following: (Use back of form for additional comments)

Working Conditions:__________________________________________________________  
Employee Relations:__________________________________________________________  
Supervision:_________________________________________________________________  
Productivity:_________________________________________________________________  
Efficiency:__________________________________________________________________
What challenges did you have in your job?

___________________________________________________________________________

What made employment enjoyable?

___________________________________________________________________________
EXIT INTERVIEW

Name: ___________________________________ Dept. __________________________

Your candid opinions are appreciated and will not jeopardize any future employment possibilities or job references. All information herein is confidential, except for unemployment insurance purposes.

Please check all items that apply to you.

1. WHY ARE YOU LEAVING YOUR JOB WITH THE CITY?

   ___ a. To start a new job at ________________________ , starting ______________.

   ___ b. To look for another job that: (check one or more)

   ___ Offers a higher salary.

   ___ Has better working conditions

   ___ Is closer to home.

   ___ Offers more opportunity for promotion

   ___ Has better fringe benefits.

   ___ Will allow me to do a different type of work.

   ___ Other ________________________________
1. The following is a list of reasons that were given by employees for leaving the employ of the City of New York. Indicate which apply:

   - c. To enter military service.
   - d. For personal problems or reasons.
   - e. Because of disharmony with my supervisor or with other employees.
   - f. To leave this area.
   - g. For health reasons.
   - h. Because my temporary work has ended.
   - i. To return to school.
   - j. To retire.
   - k. Because I was dismissed.
   - l. Other ___________________________________________________

Additional comments: _____________________________________________
__________________________________________________________________________________________

2. HOW DO YOU RATE YOUR EMPLOYMENT WITH THE CITY?

   - a. Excellent
   - b. Very good
   - c. Satisfactory
   - d. Did not meet my needs
   - e. Definitely unsatisfactory
   - f. Other ___________________________________________________

Additional comments:______________________________________________
__________________________________________________________________________________________
3. ARE YOU TEMPORARILY DISCONTINUING EMPLOYMENT WITH THE CITY?

____ yes,     _____ no   If yes , Please explain: ________________________________
____________________________________________________________________________
On what date do you expect to return or to be available to return to work with the city: ________________________________

4. DO YOU WISH TO BE CONSIDERED FOR FUTURE EMPLOYMENT WITH THE CITY?

_______ yes, in the following position ________________________________
_______ no

5. DO YOU PLAN TO USE THE CITY AS A REFERENCE FOR FUTURE EMPLOYMENT?

_____ yes,     _____ no

If yes, have you completed an Employee Reference Waiver?

_____ yes  _____ no

6. HAVE YOU ANY SUGGESTIONS TO IMPROVE EMPLOYEE SERVICE TO THE CITY, MANAGEMENT’S RELATIONSHIP WITH EMPLOYEES, OR CITY SERVICE TO THE PUBLIC?

____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

SIGNATURE________________________________        DATE_____________________

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7. **SUPERVISOR/DEPARTMENT MANAGER’S COMMENTS:**

   a. Date of notice of termination of employee: _________

   b. Date of employee’s last day at work: _______________

   c. Do you concur with employee’s stated reason for leaving:

      _____ yes _____

      _____ no, please explain: ________________________________________________

      ________________________________________________________________

      ________________________________________________________________

   d. Additional comments: _________________________________________________

      ________________________________________________________________

      ________________________________________________________________

      ________________________________________________________________

      ________________________________________________________________

INTERVIEWED BY: _________________________ DATE: _________________________

Upon completion, return to Employee Services Manager.
Exit Interview

Employee Name ___________________________ Department _______________________

Job Title ___________________________ Division _______________________

Date of Hire ___________________________ Date of Termination ___________

Age ___________________________ Race ___________ Sex ___________

Reason for Leaving ___________________________________________________________

1. Was the decision to leave City employment influenced by the following? Check all that apply.

_____ Better job or opportunity

_____ Type of work with City

_____ Rate of pay

_____ Supervision

_____ Other, please list____________________________________

Explanation of decision factors checked: _________________________________________

___________________________________________________________________________

_____________________________________________________________________________

___________________________________________________________________________

_____________________________________________________________________________

2. If leaving for another job, what does that job have that this job does not?

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

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3. Did you understand what your job consisted of before you started?____________________

4. Were you able to use your skills to their fullest potential in your job?____________________

5. How would you rate the following: _____________________________

<table>
<thead>
<tr>
<th>Item</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
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</thead>
<tbody>
<tr>
<td>Cooperation within your work unit</td>
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<tr>
<td>Cooperation with other departments</td>
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<td></td>
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<tr>
<td>Orientation to job when hired</td>
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<td></td>
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<tr>
<td>Physical working conditions</td>
<td></td>
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<tr>
<td>Job Safety Emphasis</td>
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<tr>
<td>Adequacy of Equipment</td>
<td></td>
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<tr>
<td>Adequacy of training</td>
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<tr>
<td>Communication within department</td>
<td></td>
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<tr>
<td>Communication regarding benefits and policies</td>
<td></td>
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<tr>
<td>Communication regarding general employee info</td>
<td></td>
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<tr>
<td>Supervision</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Workload</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Pay  __  __  __  __  __  

Benefits  __  __  __  __  __  

Performance appraisal  __  __  __  __  __  

6. Describe the strengths of your department.
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

7. What do you feel would have made your job easier?
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

8. If you were leading your department, what would you do differently?
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

9. If you were leading the City of Jefferson, what would you do differently?
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

10. What do you feel would make this a better place to work?
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

11. Returns:  City keys  __  Benefits:  Vacation
Uniforms  __  Sick Leave
Equipment  __  Comp
Other  __  Insurance
Tuition Reimbursement  
Cafeteria Plan  __

Interviewer  
Date  

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EXIT INTERVIEW

WHY AN EXIT INTERVIEW?

YOU are the person most familiar with your job - what's good about it and what might be improved. Your responses to general questions about your position, the section where you've worked, and the Department of Administration as a whole can help DOA keep its work environment up-to-date.

Information compiled from the exit interview will be summarized quarterly by division and shared with the Secretary of Administration for use in future planning. Findings from the quarterly reports will be forwarded to division directors on a semi-annual basis.

No names will be used in the compilation of these reports.

EXIT INTERVIEW QUESTIONS

1. What is your reason(s) for leaving? Please note all that apply in rank order with (#1) being the primary reason for leaving.

   a.   Promotional Opportunity Within State Government
   b.   Promotional Opportunity Outside State Government
   c.   Retirement
   d.   Lack of Internal Opportunities for Career Growth
2. What changes could have been made to make the workplace better? Please note all that apply in rank order with (#1) being the primary reason.

a. ___ Better work setting, supplies, equipment, tools, etc. (please specify)

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

b. ___ Salary. (Please explain)

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

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c. ___ Work Schedule (Please explain)

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

d. ___ Increased Workload

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

e. ___ Adequate training. (Please specify training needs which will aid performing the job better)

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

f. ___ Changes in policies and procedures. (Please be specific)

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

g. ___ Better communication. (Please be specific)

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________
h. ___ More direction about how to do my job. (Please explain)

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

i. ___ Other (Please explain)

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. If you could describe your general attitude about your job satisfaction, which of the following would best reflect your feelings?

(a.) ___ Very Satisfied

(b.) ___ Satisfied

(c.) ___ Somewhat satisfied

(d.) ___ Dissatisfied

(Please explain) ___________________________________________________________
________________________________________________________________________
________________________________________________________________________

4. Are there any other areas we have not covered which you would like to discuss?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

________________________________________________________________________

_________________________          ____________
Interviewer        Date

Division_____________________________________
Classification_________________________________
EXIT INTERVIEW QUESTIONNAIRE

This form is available on the network - g:\oa\forms\exit_interview.doc and on the Intranet (common documents)
Please take the time to answer the following questions as honestly as possible. Your individual responses are confidential and will not become part of your personnel file. This information is very important and will assist us in analyzing the factors contributing to employee turnover. Thank you for your assistance.

Name: 
Employment Date: 

Supervisor: 
Termination Date: 

Department: 
Position: 

What prompted you to seek alternative employment/leave COG?

<table>
<thead>
<tr>
<th>Type of work</th>
<th>Quality of supervision</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work conditions</td>
<td>Lack of recognition</td>
<td>Family circumstances</td>
</tr>
<tr>
<td>Self-employment</td>
<td>Poor health</td>
<td>Retirement</td>
</tr>
</tbody>
</table>

Better job opportunity (please describe):

Other (please specify):

What did you think of your supervision in regard to the following?

<table>
<thead>
<tr>
<th>Demonstration fair and equal treatment</th>
<th>Almost Always</th>
<th>Usually</th>
<th>Sometimes</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provided recognition on the job</td>
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<tr>
<td>Developed cooperation and teamwork</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encouraged and listened to suggestions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Resolved complaints and problems
Followed policies and procedures
Comments:

<table>
<thead>
<tr>
<th>How would you rate the following in relation to your job?</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooperation within your department</td>
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<tr>
<td>Cooperation with other departments</td>
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<tr>
<td>Communications within your department</td>
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<tr>
<td>Communications within the agency as a whole</td>
<td></td>
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<tr>
<td>Communications between you and your manager</td>
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<td></td>
<td></td>
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<tr>
<td>The training you received</td>
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<tr>
<td>Potential for career growth</td>
<td></td>
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<tr>
<td>Opportunity for advancement</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Was your workload usually:</th>
<th>Too great</th>
<th>Varied, but all right</th>
<th>About right</th>
<th>Too light</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Comments:</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>How did you feel about your salary and the employee benefits provided by NCTCOG?</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base salary</td>
<td></td>
<td></td>
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<tr>
<td>Medical/Dental Plan</td>
<td></td>
<td></td>
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<tr>
<td>Life/LTD/AD&amp;D</td>
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<tr>
<td>Vacations</td>
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<p>| | | | |
|                           |      |      |      |
| Comments:                 |      |      |      |</p>
<table>
<thead>
<tr>
<th>Comments:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Are there any other benefits you feel should have been offered?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If yes, please specify:

<table>
<thead>
<tr>
<th>Comments on benefits:</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>How frequently did you get feedback and/or performance reviews? What are your feelings about them?</th>
</tr>
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<table>
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<tr>
<th>How frequently did you have discussions with your manager about your career goals?</th>
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<table>
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<tr>
<th>What did you like most about your job and/or the agency?</th>
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<table>
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<tr>
<th>What did you like least about your job and/or the agency?</th>
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<table>
<thead>
<tr>
<th>If applicable, what does your new job offer that your current job at NCTCOG does not?</th>
</tr>
</thead>
</table>

| Would you recommend NCTCOG to a friend as a place to work? |
| --- | --- | --- |
| Yes, definitely | Yes, with reservations | No |
Why do you feel this way?

Additional comments about your job or NCTCOG:

<table>
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<th>Is there anyone you would like this completed form to be shared with?</th>
<th>Yes</th>
<th>No</th>
</tr>
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<tr>
<td>Supervisor</td>
<td>Program Director</td>
<td>Executive Director</td>
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