INVICTUS

Education Trust

Employee Leavers & Trust Resource Policy

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Document Control and Version Control

DOCUMENT CONTROL	
POLICY TITLE:	Employee Leavers & Trust Resources Policy
POLICY AUTHOR:	A Clarke, Chief Finance Officer
VERSION NUMBER:	V 1.0
DATE APPROVED:	13.10.2026
DATE EFFECTIVE:	14.10.2026
DATE DUE FOR REVIEW:	October 2027
POLICY STATUS:	Non-statutory policy
POLICY TYPE:	Trust wide
REQUIRED TO PUBLISH:	No
POLICY LEAD:	A Clarke, Chief Finance Officer
APPROVAL LEVEL:	Executive Team

VERSION CONTROL			
VERSION	**AUTHOR**	**DATE**	**CHANGES**
V 1.0	A Clarke, Chief Finance Officer	October 2026	New Policy

Invictus Education Trust

Employee Leavers & Trust Resources Policy

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1. Our Mission, Vision and Values

Mission

'Excellence every day, unlimited ambition and transforming lives'

Vision

'To create a community of inclusive schools where people choose to learn with us, work with us and belong with us, so that everyone succeeds'

Values

- Respect
- Resilience
- Relationships

2. Purpose of this document

This policy establishes a single controlled process for employees leaving Invictus Education Trust. It ensures that HR coordinates the leaver process, line managers complete local handover and property-return actions, IT maintains accurate equipment records and plans reassignment, and Finance provides independent reconciliation, challenge and assurance.

Invictus Education Trust is committed to ensuring that employees leaving the organisation are managed through a consistent and controlled process which protects Trust resources, information and finances.

3. Scope

This policy applies to all employees leaving Invictus Education Trust, including resignation, retirement, redundancy, dismissal, expiry of a fixed-term contract or any other reason. The same principles should be applied, where appropriate, to agency workers, trainees, consultants, contractors and other individuals who have been provided with Trust equipment or access to Trust systems.

Trust resources include, but are not limited to:

- laptops, tablets, desktop equipment, mobile phones and associated peripherals;
- keys, access cards, fobs and identification cards;
- purchasing cards and other payment cards;
- specialist equipment and other Trust property;
- documents, records and confidential information; and
- software licences and access to Trust systems.

4. Principles

- HR owns, initiates and monitors the employee leaver process.
- Line managers are responsible for the local handover and ensuring Trust property is returned by the required date.
- IT is responsible for IT asset control, inventory accuracy, return, condition assessment, reassignment and access removal.
- Finance provides periodic reconciliation, challenge and assurance; it does not operate the individual leaver process.
- Serviceable Trust resources should be reused or reassigned before new equipment is purchased wherever practicable.
- A new starter does not automatically create a requirement for a new laptop or other equipment.

5. Roles and Accountability

Role	Key responsibilities
HR	Initiate and coordinate the leaver process; maintain the central starters/leavers master control; notify relevant functions; monitor completion; coordinate unresolved property cases and escalation.
Line Manager	Ensure handover; identify and secure return of Trust property; confirm whether the post is being replaced; notify changes and exceptions promptly.

IT	Check allocated assets; receive and record equipment; update inventory; remove system access; assess condition; identify equipment for reassignment; forecast shortages and evidence genuine procurement needs.
Finance	Undertake periodic reconciliation and exception review; challenge unreconciled assets and unnecessary procurement; support recovery valuation/action; escalate material or recurring issues.
Employee	Return all Trust property and complete reasonable handover requirements by the agreed date.

6. Notification and Recording of Leavers

Once HR receives formal notification that an employee is leaving, the employee must be added promptly to the central Starters & Leavers Master Control. HR will notify the line manager, relevant Headteacher/Executive Leader, IT, Payroll, Finance where appropriate and any other relevant service. Information should be communicated sufficiently early to allow handover, asset recovery, access changes and replacement resource requirements to be planned.

The master control should record, as a minimum, the employee/post, school or service, final working day, replacement/additional-post status, linked starter or vacancy where known, IT asset position, return/reassignment status, procurement requirement and completion/exception status.

7. Line Manager Responsibilities

Before the employee's final working day, the line manager must ensure an appropriate handover, identify Trust property held by the employee, agree arrangements for return, ensure relevant Trust information is stored appropriately, and communicate any outstanding issue to HR. Trust equipment must normally be returned on or before the employee's final working day. Collection should not routinely be deferred to a later event or subsequent visit.

8. HR Responsibilities

HR acts as the central coordinator. A leaver should not be regarded as fully processed until HR has appropriate confirmation that required actions are complete or any outstanding matter has been formally recorded, allocated to an owner and escalated where necessary. HR will maintain the master control and link starters to leavers/posts wherever possible.

9. IT Equipment and Inventory Management

School IT Technicians, supported by the Central Network Manager/Digital Team, must maintain accurate records of equipment allocated to employees. Records should include asset/serial number, employee, location, issue/return dates, condition and subsequent reassignment, storage or disposal.

Returned equipment must be inspected and the inventory updated promptly. Serviceable equipment should be retained securely and reassigned wherever practicable before new equipment is purchased.

10. New Starters, Replacements and Procurement

The line manager, HR and IT must establish whether an appointment is a direct replacement, additional post, temporary/maternity cover, internal move or other arrangement. Existing equipment associated with the post or otherwise available across the Trust should be considered first. For temporary cover, equipment associated with the substantive post should normally be used where appropriate.

Before additional IT equipment is purchased, IT must be able to demonstrate that available equipment and known leaver returns have been considered, reassignment is not reasonably possible, there is a valid operational requirement, and the purchase is approved under the Trust's Financial Authorisation Thresholds and procurement procedures.

11. Return, Transfer and Reassignment of Assets

Trust assets must not be transferred informally between employees without the corresponding inventory record being updated. IT equipment should be returned through the designated IT process so its return, condition and subsequent allocation can be documented. Assets no longer serviceable or required must be disposed of through approved asset disposal and information-security arrangements.

12. Finance Oversight and Reconciliation

Finance will provide independent assurance through periodic reconciliation of HR leavers/starters information, IT asset records, equipment returned/reassigned, outstanding items and new equipment purchased. Finance may challenge cases where assets remain allocated to former employees, records are incomplete, equipment cannot be located, or purchases appear unnecessary. Material or recurring discrepancies may be escalated to the CFO and relevant Executive Leader/Headteacher.

13. Failure to Return Trust Property

Where property is not returned, the Trust will normally follow a proportionate staged process:

Stage 1 – prompt contact by the line manager and/or HR to arrange return.
Stage 2 – formal written request identifying the property, return arrangements, a reasonable deadline and possible consequences.
Stage 3 – HR and Finance consider whether financial recovery is appropriate and whether any salary deduction is legally and contractually permitted. No deduction will be made solely on the basis of this policy or checklist.
Stage 4 – where appropriate, a formal request for return or repayment of the reasonable value of the property.
Stage 5 – where reasonable recovery attempts have failed, the Trust may consider a Letter Before Claim and, where proportionate and authorised, County Court proceedings. If judgment is obtained, a County Court Judgment may result in accordance with the applicable court process.

Before legal proceedings are commenced, the Trust will consider proportionality, including asset value and age, likely recovery costs and the individual circumstances, and will obtain legal advice where appropriate.

14. Exceptional Circumstances

The standard process may be adapted for dismissal with immediate effect, long-term sickness immediately before termination, death in service, safeguarding concerns, police involvement, an instruction not to attend the workplace or another exceptional situation. HR will coordinate an appropriate alternative process. Information-security and safeguarding requirements take priority where immediate restrictions to access are necessary.

15. Monitoring and Assurance

HR, IT and Finance will periodically review compliance. Ahead of periods of significant staffing movement, particularly May to September, HR will coordinate a forward-looking starters and leavers exercise identifying known leavers, replacements, additional posts, equipment due back, resources available for reassignment, anticipated shortages and genuine procurement requirements. Significant or recurring failures will be escalated through the appropriate Executive Leader.

16. Review

This policy will be reviewed annually, or sooner where changes to legislation, Trust systems, contractual arrangements or identified control weaknesses require an earlier review. Compliance may also be considered through the Trust's internal scrutiny programme.

Parental Impact Assessment

As part of the policy review process, consideration has been given to whether the policy, or any changes to it, has a direct impact on parents and carers. This includes assessing whether changes affect parental responsibilities, required actions, communication processes, or understanding of Trust or school practices.

Decision:
The Trust Executive Team has determined that parental communication is:

- ❖ Not required for this policy

Appendix 1 - Employee Leaver and Resource Management Workflow

HR receives notification
Record leaver on the central Master Control -> confirm final contractual/working date -> open checklist -> notify Line Manager, IT, Payroll and other relevant functions.

Establish post status
HR + Line Manager identify replacement, vacancy, additional post, temporary cover, internal move or post not replaced. Link the starter/replacement where known.

Identify resources
Line Manager identifies Trust property. IT checks inventory against the employee. Discrepancies should be investigated before the employee leaves wherever possible.

Final working day
Employee returns equipment/property -> IT records IT return -> Line Manager confirms other property and handover. Equipment should normally be recovered by the final working day.

IT updates inventory
Verify asset -> assess condition -> update inventory -> prepare for reassignment, repair or approved disposal.

Match resources to starters
HR + IT compare starters with available/returned equipment. Reuse/reassign where suitable. Only genuine resource gaps proceed to procurement.

Property not returned
Notify HR -> contact former employee -> formal written request -> consider lawful recovery -> Letter Before Claim / County Court action where proportionate and authorised.

HR closes record
GREEN: complete; AMBER: monitored outstanding action with owner/deadline; RED: escalation required.

Finance periodic assurance
Reconcile HR Master Control <-> IT inventory <-> returned/reassigned assets <-> new purchases. Investigate and escalate exceptions.

Appendix 2 - Employee Leaver Checklist

Employee details	Record
Employee name	
School / Central Team	
Job title	
Line manager	
Date notice received	
Final contractual date	
Final working day	
Post being replaced?	Yes / No / TBC
Replacement name/start date	

HR lead	

HR - Initiate Leaver Process

Action	Complete	Date / Comments
Employee added to central Master Control	☐	
Final contractual/working date confirmed	☐	
Line manager notified of responsibilities	☐	
IT notified	☐	
Payroll notified	☐	
Finance/other functions notified where appropriate	☐	
Replacement/additional-post status recorded	☐	
New starter linked to leaver/post where applicable	☐	
Exceptional circumstances identified where relevant	☐	

Line Manager - Handover and Trust Property

Action	Complete	Date / Comments
Work/responsibility handover completed	☐	
Relevant records saved within Trust systems	☐	
Trust documents/information transferred	☐	
Laptop/device identified	☐	
Phone identified where applicable	☐	
Keys/access card/fob/ID returned	☐	
Purchasing/payment card returned where applicable	☐	
Other Trust equipment returned	☐	
Outstanding property reported to HR	☐	

IT - Equipment and Access

Action	Complete	Date / Comments
IT inventory checked for allocated assets	☐	
Laptop/device and peripherals returned	☐	
Asset number verified and condition checked	☐	
IT inventory updated	☐	
Device securely prepared for reuse	☐	
Network/system access disabled at appropriate time	☐	
Software/licences reviewed/recovered where appropriate	☐	
Equipment available for reassignment identified	☐	
Replacement employee identified where applicable	☐	
Equipment reassigned and inventory updated	☐	

IT Resource Decision

- ☐ Suitable for immediate reassignment
- ☐ Suitable following repair/reconfiguration
- ☐ Retain for replacement employee
- ☐ Available for another Trust employee
- ☐ Not fit for continued use - disposal required
- ☐ No equipment returned / outstanding

Additional IT equipment required? ☐ No ☐ Yes - existing Trust resources cannot meet the requirement

Reason / procurement justification:

Outstanding Trust Property

Action	Complete	Date / Comments
Initial contact made	☐	
Return arrangements agreed	☐	
Formal written request issued	☐	
Returned - no further action	☐	
Referred to HR/Finance for recovery consideration	☐	
Referred for formal debt recovery consideration	☐	

HR - Final Review

Action	Complete	Date / Comments
Required checklist sections completed	☐	
Trust property returned or outstanding items formally recorded	☐	
IT confirmation received	☐	
Payroll actions completed	☐	
Outstanding matters assigned to named owner/deadline	☐	
Employee recorded as fully processed or exception recorded	☐	

Leaver status: ☐ GREEN - Complete ☐ AMBER - Monitored action ☐ RED - Escalation required
Outstanding action / owner / deadline:

_____

HR Officer: _____ Date: _____

Finance Assurance - Where Applicable

Finance does not approve every individual leaver checklist. Where an individual case is referred to Finance, record the applicable actions below.

- ☐ Asset/accounting records reviewed
- ☐ Financial value confirmed where required
- ☐ Procurement requirement challenged/validated
- ☐ Recovery action considered
- ☐ Matter resolved
- ☐ Matter escalated to CFO