



MEMBER OFFBOARDING PROCEDURE

Purpose

To ensure that when a member exits the Society, the process is respectful, consistent, timely, safeguarding-focused, and guided by the Rule, while:

- Protecting clients, members, and the Society
 - Ensuring systems access and assets are appropriately managed
 - Capturing learning to support future member retention
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Scope

This procedure applies to all Members of the Society, including:

- Conference Members
- Office Bearers (e.g. Presidents, Treasurers, Secretaries)
- Members holding Society-issued assets or system access

This procedure does not replace employee HR exit processes.

Guiding Principles

Member exits should be:

- Dignified and respectful
 - Safeguarding-focused
 - Proportionate to the role held
 - Clear and well-documented
 - Supportive of ongoing Vincentian connection, where appropriate
 - Guided by the Rule and the Society's values of respect, service, friendship, and dignity
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Role Review and Transition Planning

Member wellbeing should be prioritised through regular, supportive conversations about role sustainability and future participation.

- All member roles should be reviewed at least every four years, or earlier where the Member's circumstances, wellbeing, or the needs of the Conference change.

- As part of the review, the Member and the next appropriate leader should discuss the Member's future role, including whether they wish to continue, take a period of rest, share duties, or transition responsibilities.
 - Members should be reassured that they are not expected to remain in a role because they believe no one else will step forward. Leaders should work with them to support a safe, respectful, and planned transition.
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Exit Triggers

An exit process must be initiated when a Member:

- Voluntarily resigns
 - Is no longer active and confirms cessation
 - Steps down from membership following role changes
 - Has membership ceased under Society rules
 - Chooses to transition to retired member status, where this is appropriate and available under the Rule, including the option to join a Bailly's Conference
 - Transfers to another Conference or Council (partial exit)
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Roles and Responsibilities

Conference President / Regional Representative

- Acknowledge the Member's decision to exit
- Ensure respectful communication and thanks
- Initiate the Member Offboarding Form
- Coordinate the return of any Society property

Conference Support / Membership Team

- Confirm membership records are updated
- Coordinate system and access removal
- Ensure safeguarding and compliance records are closed
- Offer exit feedback options where appropriate

ICT / Corporate Services

- Action system access changes as required, including:
 - Email
 - TechnologyOne
 - Member Connect
 - Training systems (e.g. Litmos)
 - Security cards, keys, and access codes
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Offboarding Process

Notification

The Member notifies either:

- Their Conference President, or
- Conference Support / Membership Team

Notification may be verbal or written.

Acknowledgement

The Conference President or delegate:

- Thanks the Member for their contribution
 - Confirms the effective exit date
 - Explains the offboarding steps at a high level
 - Where suitable, makes the Member aware of options for maintaining a connection with the Society, including becoming a retired member and joining Bailly's Conference
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Initiation of Offboarding

The Conference President or Manager completes the Member Offboarding Form, including:

- Member name and role
 - End date
 - Confirmation of returned assets
 - Systems requiring deactivation
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Systems and Access Removal

Relevant teams ensure:

- Email and account access is removed
 - Training and system access is revoked
 - Member Connect access is updated
 - Security cards, keys, and codes are deactivated
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Asset and Records Finalisation

Confirmation is obtained that:

- All Society property has been returned
- There are no outstanding liabilities
- Membership records are updated
- Safeguarding records are closed in line with policy

Exit Feedback

Where appropriate, the Member may be:

- Offered an exit survey or informal feedback opportunity
 - Thanked for insights to support continuous improvement
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Special Circumstances

Immediate or Involuntary Exit

Where an exit relates to safeguarding, conduct, or risk:

- Access to be removed immediately
 - Communications are coordinated with senior staff
 - Documentation must be clear, factual, and confidential
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Office Bearer Role Changes

Where a Member steps down from an office bearer role but remains a Member:

- Only role-specific access is removed
 - Membership remains active
 - Records clearly reflect the change
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Records Management

All offboarding documentation must be:

- Stored securely
 - Accessible only to authorised personnel
 - Retained in line with privacy and record-keeping requirements
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