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# Associate Release Request Form:

# client managed engagement

This form **must** be completed by the Engagement Manager (EM) where a Client or an EM is seeking the release of any Associate on a Client Managed Project.

Process:

* EM to complete the information below relating to the Associate to be released and submit to your line manager for review.
* Where the release is at the specific request of the client, please ensure client approval is received in writing and accompanies this form.
* Line Manager - review the situation relating to the release and where the release reason is related to Quality or Production ensure that the Associate:
  + Has been set realistic achievement goals and realistic timescales for achievement;
  + Has been asked what support they require to achieve the required goals and where appropriate that this support has been provided;
  + Where appropriate Associate is aware that failure to achieve the required goals could result in their release.
* If the Line Manager is satisfied that the release decision is justified, EM can proceed with the release of the Associate.
* Where Line Manager believes release would be inappropriate, document alterative action to be taken and ensure that this is implemented and that a detailed audit trail is maintained.
* Where an issue requires dealing with urgently (misconduct, violence etc,) consider sending home the Associates involved until a full investigation can be completed and appropriate decisions made.

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| **Associate Name** |  |
| **Contract Dates** |  |
| **Project Code & NAme** |  |
| **Client** |  |
| **summary as to why release is being recommended**  **(e.g. unacceptable quality, attitude issues, misconduct issues, unable to achieve sign off)** |  |

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| detailed summary of the issue(s) surrounding the release of the Associate. Provide MI where available (embed spreadsheet if necessary) to support recommendation |
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| Additional Support  (complete for productivity, quality and absence related issues) |
| Has the Associate been asked if they require additional support to achieve the required goals? |
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| What support was requested? |
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| What support was provided? |
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| Awareness of release |
| Is the Associate aware that they could be released? |
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| Are we aware of anything else which should be taken into consideration prior to releasing the Associate? |
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| Are we aware of any potential challenge to releasing the Associate? |
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| Line Manager comments supporting Associate release |
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