

The decision to separate an employee is never an easy one even when based on a sound business decision. Separating an employee is one of the most difficult responsibilities a manager will encounter. Proper planning and facilitation of the separation meeting helps make a challenging situation go as smoothly as possible by having a thought through the logistics and timing and crafting a clear message with respectful delivery. Outlined below is a preparation checklist for planning and conducting employee separations:

Overview

- Target Notification Date (one day event or series of days): _____ (check religious holidays, local/company events, vacations, customer appointments, business travel, vacations, etc.)
- Separation event to be carried out: (e.g. as one project, regionally, by site)
- Timeline for implementation of the separation event(s)
- Summary of roles and responsibilities of staff implementing the event
- Total Number of employees affected: _____
- Levels in the organization impacted: _____
- Last day of service on the event day or working notice after the announcement?
- Business reason for separation determined and discussed with Management and HR
 - Alternatives considered?
 - Reduction in non-personnel costs
 - Hiring freeze
 - Attrition
 - Reassignment or retraining
 - Flextime/job sharing/reducing work hours
 - Transfers/demotions
 - Reducing or freezing compensation
 - Unpaid leaves/sabbaticals
 - Voluntary reduction
 - Early retirement / bridge to early retirement
- Documentation that objectively supports the reason for separation secured

Selection and review of personnel identified for separation

- Demographic breakdown: Name, Job Title, Hire Date, Annual Salary, Work Location, Address, Age, Length of Service, Minority Status, Performance, Future Skill Applications
- Statistical analysis of disparate impact
- Issues related to potential discrimination relative to race, color, religion, gender, sexual preference, national origin, disabilities, age, ethnicity, marital status, pregnancy, childbirth
- EEOC considerations: discrimination complaints, sexual harassment, etc.
- Workers' Compensation, Short-term or Long-term disability, Leave of absences, etc.
- Unionization
- Worker Adjustment and Retraining Notification (WARN) Act requirements
- Older Workers Benefit Protection Act (OWBPA) issues
- Documentation of performance
- Review of Record of Employment (ROE)
- Consideration for significant personal events in the employee's life: Anniversaries, Medical Conditions/Illnesses, Family Circumstances (e.g. aging parents, home purchases, spouse illness), emotional state (potential reactions to the news), readiness for termination, other family members affected by this event
- Review any Individual Employment Contracts and/or any previous verbal promises for advancements, etc.
- Termination process consistent with company practices
- Sign-off by company official approving selectees for termination

Benefits

- Review Severance Policy and consistently apply
- Final pay calculation
- Pay in lieu of notice
- Separation of labor standards from retiring allowance for severance letter, if applicable
- Payment for:
 - Severance calculations
 - Vacation time/paid leave accumulation - when applicable
 - Retirement benefits – vested/non-vested
 - Applicable pension plans
 - Insurances: - Medical, Life, Accidental death, Travel, Dependent life
- Payroll Deductions:
 - Credit union
 - Garnishments
 - Review and election sheets, if applicable
 - Savings plans: bonds, 401(k), investment plans
 - Pension Plans
 - Stock options
- Miscellaneous:
 - Tuition reimbursement
 - Adoption assistance
 - Product/service procedures
 - Expense Reports
- COBRA/Medical Coverage Continuation
- Unemployment Compensation eligibility
- Outplacement/Career Transition Assistance
- Employee Assistance Program (EAP)/Employee Family Assistance Program (EFAP)
- Training funds
- Reference Request issues
- Reminder of previously signed non-compete and non-disclosure Agreements
- Retention bonus
- Extended severance for special circumstances

Official filings and notification to key stakeholders

- WARN Act, if applicable
- Board of Directors
- Management delivering the messages
- EAP/EFAP
- Outplacement providers
- Regulatory agencies, licensing authorities
- Others

Letters, documents & materials

- Severance packages reviewed and prepared
 - Separation letter outlining severance, date of termination, benefits, outplacement, etc.
 - Release/Agreement letters (to whom, by when)
 - Severance Policy
 - EAP/EFAP materials and contact information
 - Unemployment information
 - Benefits and conversion election forms
 - HR contact
 - Non-compete/Non-disclosure documents, if applicable
 - Frequently Asked Questions document
 - Other
- Scripts for notifications
- Press releases
- Others

Logistics

- Identify staff to serve as runners, escorts, notifiers, backups, etc.
- Schedule for announcements (timeline)
- Identify resources for each and schedule rooms as needed for
 - Notification Meetings
 - Outplacement Consultants
 - EAP/EFAP Representatives
 - Medical personnel
- Establish process and identify individuals who need to return company property such as Car, ID/access cards, keys, laptops, PCs, manuals, samples, reports, proprietary/confidential materials, cell phones, ipads, etc.
- Address issues of IT access, security clearances, access codes, passwords, voice mail access, e-mail access, etc.
- Determine how employee leaves the organization following notification
 - Process for obtaining personal belongings and after-hours access if needed
- Identify employee transportation and potential security issues
- Determine exit interview process if applicable
- Review and remind of reference policy
- Process for returned separation releases

Communications

- Key staff members, Board, etc.
- For separated employees:
 - Confidential/private setting
 - On-site assistance from Career Partners International Representatives
 - On-site assistance from EAP representatives
 - Employee Departure Time
 - Movement of Personal Property
 - Employee Transportation and Security issues
 - Frequently Asked Questions document
- For remaining employees:
 - Business reason for the restructuring

- How work will be transitioned
- What can be said about separated employees/references
- How is the phone answered
- Frequently Asked Questions document
- Share how separated employees are being helped through their transitions (e.g., severance, career transition services, etc.)
- Future of organization and role they play in achieving business objectives
- For external constituencies:
 - Plan Administrators of the employee's change in status
 - Clients, vendors, suppliers, agencies, etc.
 - What is said about how work is being transitioned
 - Regulatory Agencies (licenses, registrations)
 - Press Releases and media spokesperson
- Confidential meeting of Notifiers and support staff involved in implementation of the event

Notifier Training

- Training for staff delivering message and their backups
- Review of separation materials by those delivering the message
- Dry run of event day

Transition of Work Assignments

- Redesigned work process
- Elimination and reallocation of workloads
- Update directories and reroute mail and calls

Day of Event

- Ensure all employees are accounted for
 - Notifiers/Backups
 - Employees to be notified
- Phone coverage for Notifying staff
- Packets in Notifiers' hands
- Tissues and water in meeting rooms
- Boxes for personal belongings

After Event

- Debrief with event staff
- Provide ongoing support to individuals, teams and managers including support programs such as change management, career management, teambuilding, leadership development, cross-training