

CHECKLIST FOR TERMINATION

by Angelo Pesce, CHRP, CMC

Introduction

Conducting a termination well is extremely important to an organization. Not only can it save it thousands of dollars, but it can also ensure that morale and productivity are not adversely affected. Indeed, it can actually create a sense of opportunity for positive change.

There are three (3) phases involved in the successfully termination of an employee. Each phase requires careful planning and error-free execution. Here is a simple checklist to help you ensure that the difficult business of termination goes as smoothly and beneficially as possible for all parties.

Phase 1 – Before Termination

1. Check the individual's personnel file to ensure that all obligations have been met, that the severance package has been developed (if termination is not for cause), and that all employment legislation has been considered.
2. Draft the termination letter.
3. Prepare a release document.
4. Arrange for relocation counselling, if this is part of the package. Ensure that the counsellor is able to be present on the day the termination is to take place.
5. Arrange with IT to remove the person's access to computers and other electronic equipment on the appointed day. Also ensure that key information is protected in case of an attempt to sabotage the information.
6. Notify Security to ensure that the person's name is deleted from the employee list for both internal and external use.
7. Arrange for a proper meeting room. The room should be one you can leave in order to let the employee remain there to compose himself or herself. In other words, this meeting should not be held in your office.
8. Schedule the meeting.

Phase 2 – The Meeting

1. Ensure that letter of termination has been signed.
2. Advise the employee that he or she is being terminated and indicate whether it is for cause. If it is for cause, outline the process followed to arrive at the decision to terminate, including the investigation that was conducted. If it is not for cause, state very briefly the reason for the termination.
3. Provide the employee with the letter and briefly explain its contents.
4. Advise the employee whom to contact in future if there are any questions or follow-up.
5. If relocation counselling is part of the package, advise the employee that a counsellor is nearby to assist and ask whether the person wishes to meet with the counsellor now.

6. If no relocation counsellor is present, or after the person has met with the relocation counsellor, arrange for the person to leave the premises. Does he need to get his coat or briefcase? Will she be allowed to go back to her office or will she be required to leave the premises immediately?

Phase 3 – After Termination

1. Organize communication sessions with colleagues and for the organization in general.
2. Change messages on the phone line and e-mail.
3. Ensure that the termination agreement is completed.
4. Ensure that the termination agreement is implemented.
5. Keep the terminated employee on payroll and benefits for at least the statutory period.
6. After a week or two, check back with colleagues to ascertain the state of operations and morale.
7. Review the termination process and make changes to this checklist as required.

Conclusion

How a person is terminated will affect the employer's reputation, both internally and externally. Staff need to know that values such as respect and dignity are being adhered to, even when such a difficult task as termination is being executed.

Angelo Pesce is the President and Principal Consultant of Pesce & Associates, a full-service human resources consulting group. Visit www.pesceassociates.com.

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