WILLIAM & MARY

Non-Voluntary Termination Checklist for Supervisor/Manager

BEFORE MEETING WITH EMPLOYEE	
☐	Contact Employee Relations for consultation to review reasons/documentation for termination.
	Be prepared to provide specific reasons for termination: What exactly did the employee do or not do? What were the specific behaviors of concern? Focus on specific behaviors or actions. Explain how the above behaviors were a violation of job expectations. List all coaching sessions with the employee to correct performance expectations. Include dates and expectations discussed. Documentation of coaching sessions, along with expectations for improvement is helpful to illustrate you have communicated deficiencies/behaviors to employee along with guidance for success. Did the unacceptable behavior continue after the coaching session(s)? Describe the specific incidences or examples.
☐	Before taking any action, you must talk with the Director of Employee Relations or the Chief Human Resources Officer. HR will consult with University Counsel for review and approval. Keep in mind this process may take several days. Plan accordingly. Also be mindful if this action involves a probationary employee to allow sufficient time to notify the employee prior to the end of their probationary period. Best practice is to begin process 30 days prior to end of probationary period.
☐	Draft a termination letter. The letter should clearly state that employment is terminated immediately. It should also include information about benefits contacts in Human Resources for questions on final pay, leave payout and benefits.
☐	Termination process should be kept confidential. The termination should be treated with the utmost respect and privacy. Only discuss it with those who need to know about it ahead of time. Your supervisor should be kept apprised of all discussions with and termination plans for the employee in question.
☐	Consider the timing. Hold the termination meeting in a time and place that will minimize embarrassment for the employee and ensure safety for all concerned. It's usually best to hold the meeting at the end of the day. It is not a best practice to terminate an employee on a Friday when resources are limited over the weekend.

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☐	Determine who should be present. It's best to meet privately, so the employee can save face. However, it's strongly advised to have your supervisor or someone from HR attend the meeting with you. Contact W&M Police to discuss safety plans if necessary.
☐	Consider when to cancel the employee's access. Identify what type of university access the employee has and determine if it should be cancelled prior to the meeting. Access can include: **Building Access** – email dooraccess@wm.edu with employee name, Banner ID number and date for access to be inactivated. **Network Access** – email support@wm.edu with employee name, Banner ID and date/time for access to be inactivated. Network access includes email, computer files and phones.
MEETING WITH EMPLOYEE	
☐	Get to the point. Don't spend time on complimentary remarks or small talk. Tell the employee why the decision was made, and that termination of employment is effective immediately. In some cases, it may be appropriate to agree on a way to describe the separation of service in order to minimize embarrassment for the employee.
☐	Give the original termination letter to the employee and allow a few moments for review.
☐	Collect university property such as ID card, keys, uniforms, credit card, cell phone, laptop, etc. If the employee does not have this property, make arrangements with the employee to return the items to supervisor. If necessary, contact the W&M Police to discuss arrangements for employee to return items to Police.
☐	Complete the appropriate Clearance Form with the employee. The form is determined based on the employee category. Clearance Form – Hourly, Classified & Operational Clearance Form – VIMS Clearance Form – Faculty & Professional
☐	Arrange for the employee to collect belongings. Let the employee know the meeting is over. Don't let the employee linger. If appropriate, escort the employee out of the building.
☐	If co-workers have left for the day, escort the employee to his/her workstation to collect personal items and download any personal files from his/her computer.

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☐	Contact the W&M Police to discuss arrangements for collecting personal belongings in cases where an employee is unable to collect belongings immediately.
AFTER THE MEETING	
☐	Complete a Personnel Action Form and forward to the Office of Human Resources for end of employment processing.
☐	Be prepared to explain the employee's departure respectfully to others in the department.
☐	Refer any requests for references to the Office of Human Resources at 757-221-3769.
PLANNING AHEAD	
☐	Consider if any changes are needed to the position description before recruiting for replacement. Contact the Office of Human Resources for assistance.
☐	Start Action for replacement in PeopleAdmin. Refer to the Hiring Guide for assistance on process.

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