

Voluntary Separation Planning: Managers' Checklist

This checklist is designed to guide you through the steps to take when an employee is separating from the College. A similar checklist exists for employees to guide them through the process. ***The Request to Initiate a Voluntary Separation form is required to be completed and submitted to HR for all employees who are leaving the College. Please contact HR if the effective date of the resignation is immediate.***

Summary of Steps:1 –Review this Manager Checklist & Ensure All Action Steps Are Completed

2 –Schedule a Meeting with Your Employee & Secure their Resignation Letter

3–Provide Your Employee a Copy of the Employee Voluntary Separation Planning Checklist

3 –Complete The Request to Initiate a Voluntary Separation Form

4 –Contact The HR Talent Team to Discuss Replacement/Backfilling Options

BEFORE YOUR EMPLOYEE'S DEPARTURE

- Schedule meeting with your employee to discuss transition planning including:
 - Review current and pending/scheduled work.
 - What work needs to be done before you go?
 - Do you need to meet with anyone who will be assisting in the transition?
 - Review any documentation, procedures and location of files.
 - Provide access to all work-related electronic information to your manager/department, including all passwords. Work with your manager to determine if any work-related electronic information should be transferred to a department shared drive.
- Secure resignation letter or notice of separation from employee. Once a resignation date is provided the employee should not request to use any available accrued paid time off prior to their last day of employment.
- Complete the Request to Initiate a Voluntary Separation/Resignation [Form](#)
- Contact your HR Talent Team Partner to collaborate on replacement/backfill options *
- Communicate with fellow team/department members of the employees pending separation.
- Confirm cancelation of Memberships, Licenses and Contracts and submission of any expense reporting.
- FYI – An email will be sent from HR to the employee that contains the following documents:
 - Benefits Transition Notice
 - Email/Network Access Information
 - Massachusetts- How to File a Claim for Unemployment Insurance Benefits

ON OR BEFORE EMPLOYEES LAST DAY WORKED

- Meet with your employee to confirm the status of any action items discussed during your first meeting.
- Make sure the employee is all set returning all College property including, but not limited to, any records, uniforms, cellphones, keys, tools, laptops, credit cards, and identification cards.
- Remind them they may be contacted to participate in an exit interview to provide the College with greater insight into the reasons for leaving to help us identify any opportunities for improvement.
- Continue to keep your team/department members informed of the status of the separation and plans on replacing the employee.
- Contact HR regarding any action items the employee has yet to complete including the return of any College property.

AFTER EMPLOYEE HAS LEFT THE COLLEGE

- Make sure the employee's workspace is cleared and prepared for a replacement.
- Return any Holy Cross equipment left by the employee to prospective departments, i.e. Laptop to ITS.
- Continue to communicate with your team/members of your department.
- Continue to work with HR on any replacement/backfill planning & action steps *

*Replacement/Backfill Forms: [Position Justification](#) and [Request for Temporary Staff](#)