



## Handling Terminations

### Handling a tough job effectively

*Walter, your office manager, routinely produces reports that contain inaccuracies, fails to spell check and proof-read letters and emails and fails to get his work done because he makes many personal calls daily. Others in the office are picking up work that should be done by Walter. You have had discussions with him for the past six months regarding his poor performance and have been very specific when explaining your expectations for improvement. You have even given Walter a list of your expectations in writing and provided a written warning that if things don't improve it could cost him his job.*

*Walter has assured you he will improve. He remains willing to take on new tasks and seems eager to please but the work doesn't improve. You have made many attempts to help Walter but it is clear to you that the situation is not going to change. In fact, today as you reviewed the monthly budget report from Walter, you found five serious numerical errors in it. You have decided that you have no choice but to terminate Walter.*

Ask anyone who has had to do it, terminating an employee is hard work and must be done with great care. To make sure that you manage the process well, keep the following in mind:

#### 1. Prepare for the meeting in advance.

- Make sure that the file of documentation that supports your decision is complete; the job description that sets forth duties not being properly done, the time frame in which verbal and written warnings have been given, details of the problems and failure of the employee to show improvement.
- Make sure the proper leadership has been made aware of the problems and is in agreement with the need to terminate.
- Discuss with leadership if it is appropriate or necessary to consult with legal counsel regarding this termination.
- Create a checklist of everything that you will need to address – understanding of the status of outstanding work or projects of the employee, return of company property, benefits such as unused vacation, end of and/or continuation of healthcare coverage, pension and flexible spending accounts, etc.
- Prepare a letter to give to the employee with specifics about last day of employment and relevant pay and benefit information.

- Outline or script what you plan to say.
- Choose the right time to have the meeting. Early in the day, early or mid-week is best. Having the conversation on Friday is not desirable since that gives the employee two weekend days before he can "get on with his life."
- Arrange for a quiet, private conference room.
- Typically it is a good idea to have another person to be part of the meeting to provide support and to serve as a witness (May be an officer or chair of the Human Resources committee).
- Understand the severance policy and what severance will be offered.
- Understand the reference that will be provided.
- Consider if you wish to give the employee the option of resigning.
- Plan how you intend to signal that the meeting is over, perhaps by standing and moving toward the door.

## **2. During the meeting.**

- Be respectful and keep it short. The decision has been made. This is not a time for discussion or argument. Provide the letter regarding pay and benefits.
- Be matter-of-fact. Thank the person for positive contributions but restate that – as you have talked about in the past – the organization's expectations have not been met.
- Be prepared for any emotional response – tears, anger or argument – and handle the response objectively. If the employee does want to talk, you can listen but re-state that the decision has been made.
- Retrieve any company property including keys or key cards; get any passwords needed.
- Check to see if the employee has any unpaid expenses and, if so, have the employee complete a reimbursement form.
- Let the employee know any future questions or concerns should be directed to you.

## **3. After the meeting.**

- Arrange to close down any of that employee's access to your organization's computers and email. (Change safe access code as needed.) It is never a good idea to allow the employee continued access to a computer. Be willing to supply copies of any personal files that the employee has on a flash drive within the next several days.
- You or one of your staff should accompany the employee to the workstation and stay there while the employee collects personal possessions. Offer to pack and send them in the next several days, if preferred.
- After the employee leaves, talk with the rest of the staff. Don't reveal details. Simply explain that the work did not meet your expectations and that you decided it was in the best interests of the organization to end employment. Explain what information should be given to individuals asking about the employee. Thank them for their work.
- Work with leadership to provide appropriate notice to the organization.

Being well-prepared, making sure leadership backs the decision, conducting the meeting with dignity and objectivity and following up with the remaining staff will not make the task of terminating an employee any less difficult, but you will know that you have done what you could to manage the process well.

## **Expect the unexpected**

In the last issue, we talked about the difficult task of dismissing an employee and the steps to take before, during and after an involuntary termination. Following those guidelines will help you complete the task with as much grace and dignity as possible. But what if the employee you are terminating hasn't read the script? Here are some of the things that can and do happen during such meetings – and some suggestions for how to deal with them.

- ***The employee is surprised.*** You inform the employee of your decision and the reaction is total surprise. While it may seem hard to believe, the more incompetent an employee is, the less likely he or she is to realize it. Called the Dunning-Kruger effect, research shows that poor performers are often blissfully unaware of problems with their work, even when those problems have been discussed. Having a paper trail as well as a list of specific problems and discussions about those problems handy will help to neutralize the Dunning-Kruger effect.
- ***The employee wants to discuss/dispute the matter.*** You can listen, but be prepared to state simply that the decision to end employment has been made.
- ***The employee cries or becomes angry.*** Recognize that this is an emotional time. Allow the employee to have his or her say and even to vent a little emotion. Don't interrupt or talk over the person, and have a box of tissues handy.
- ***The supervisor apologizes to the employee or says they know how the employee feels.*** Neither is appropriate during this meeting. Resist the urge to do either.
- ***The employee brings others to the meeting – a pastor or lawyer for example.*** You are not required to allow guests into the meeting. Thank them for their concern and support for the employee and offer them a place to wait until the meeting is over.
- ***The employee is/ is not allowed to remain in the workplace following the meeting.*** It is common practice to accompany the individual back to his desk to gather personal items and then to have the employee leave. This is usually in the best interests of you, the employee and other staff. However, in some work environments or in some cases, it may be okay to allow the person some time in the office. *This is always a judgment call.*
- ***The employee can't turn over keys, access cards or other property.*** Access cards should be cancelled immediately; you should have options to address picking up keys or other property promptly.

Being prepared to deal with the unexpected during a dismissal meeting will help you react appropriately to most any situation. Working from a script (or at least an outline of what will be said) and being prepared to go "off-script" will help you remain professional and maintain a dignified tone during this difficult meeting – and that is in the best interest of all concerned.

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