LEADERSHIP DEFENSE

MASTERING PROGRESSIVE DISCIPLINE AND STRUCTURING TERMINATIONS

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A PDF COMPANION TO THE AUDIOBOOK
TERMINATION CHECKLIST (FOR REVIEW ONLY)
DO NOT FILL OUT OR PLACE IN AN EMPLOYEE'S FILE

Please review the following elements when preparing to recommend an employee termination. Share any relevant issues with senior management and/or legal counsel during pre-termination discussions.

Date of hire: ________________________________

Length of tenure: ________________________________

Age (there are key protections for employees ages forty and above): ________________________________

Ethnicity: ________________________________

Gender: ________________________________

Corrective action history: ________________________________

Most recent performance review score and overall performance review history: ________________________________
Length of time in current position: ______________________

Prior positions held within our company: ________________

Open workers’ compensation claim(s):  
Yes ☐ No ☐

Open intermittent Family and Medical Leave Act (FMLA) claim(s):  
Yes ☐ No ☐

Disability status: For example, is the company currently engaging in the Americans with Disabilities Act (ADA) “interactive process” with this individual or otherwise granting some form of protected leave, modified duty, or other reasonable accommodation?  
Yes ☐ No ☐

Pregnancy status:  
Yes ☐ No ☐

Possibility of a retaliation charge for having lodged a good faith complaint against the organization (“whistleblower” protection):  
Yes ☐ No ☐

Supervisor’s age, ethnicity, and gender (to counter any potential claims of discrimination): ______________________

How long the supervisor has managed this employee: _________

Whether the supervisor originally hired the employee. (If so, a discrimination claim may be more difficult to prove):  
Yes ☐ No ☐
Specifics regarding the final/most recent incident that could justify termination: 

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Did we learn the employee’s side of the story at this point?
Yes ☐ No ☐

Any mitigating circumstances regarding the final incident:
Yes ☐ No ☐

If so, explain: ______________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Other factors: ______________________________________________________________

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