



Reduction in Force Strategy & Selection Checklist

A step-by-step planning framework for HR and leadership teams preparing a reduction in force – from defining objectives through selection, compliance review, severance design, and employee communication.

ORGANIZATION

RIF PROJECT LEAD

TARGET DATE

VERSION / REV.

Planning a RIF is one of the most difficult responsibilities HR and leadership teams take on. This checklist is designed as a practical starting point to help you think through the critical steps before, during, and after a workforce reduction so you can manage the process with clarity, dignity, and less risk.

01 Identify Desired Goals & Objectives

ACTION ITEM

- ☐ Determine the business reason for the RIF. What is the intended end result (e.g., financial, structural, strategic)?
- ☐ Examine what locations and/or positions will be affected (e.g., Is a location closing? Is a department closing? Has a position been determined as redundant?).
- ☐ Review alternatives to a RIF that will achieve the same end result (e.g., voluntary time off, furloughs, worksite)
- ☐ Identify timing for the RIF (e.g., immediately, within 30/60/90 days, or projected for the future).
- ☐ Determine the desired public narrative the company wants to portray. What information should be disseminated outside the organization (e.g., should the company issue a press release)?

02 Draft a Downsizing Plan

ACTION ITEM

- ☐ Establish a decision-making team including a representative from each stakeholder area (upper management, human resources, legal, supervisors in affected areas).
- ☐ Determine which locations, divisions, departments and/or job types will be affected based on the goals developed. Will temporary workers be included?
- ☐ Determine how to measure the depth of the necessary RIF (e.g., number of FTEs affected, locations closed, efficiency measure achieved, percentage of total compensation budget reduced).
- ☐ Evaluate whether the organization will ask for volunteers under an early retirement plan or voluntary separation plan.
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- ☐ Determine if the organization will institute a hiring freeze.
- ☐ Develop a RIF timeline based on the goals and objectives developed.
- ☐ Obtain legal counsel review of the downsizing plan.

03 Selection for RIF

ACTION ITEM

- ☐ Determine selection criteria (e.g., seniority, performance, job classification, job knowledge and skills, department, location, division) based on the downsizing plan. In a union environment, review the collective bargaining agreement for specific rights that may apply. If more than one criterion will be used, determine how they will be prioritized.
- ☐ Train the decision-making team on the criteria that will be used in the selection process.
- ☐ Develop a preliminary list of employees for the RIF.
- ☐ Review the preliminary list to determine whether an adverse impact exists for protected classes. Protected classes include: race, color, religion, sex (including pregnancy, gender identity and sexual orientation), national origin, age (40 or older), disability or genetic information, and veteran status. States may add classes such as marital status or smokers.

04 Review Federal & State WARN Act Regulations to Stay Compliant

ACTION ITEM

- ☐ Review federal WARN Act requirements and prepare notices as applicable.
- ☐ Review whether there are state WARN requirements and prepare notices as applicable.

05 Determine Severance Packages & Employee Communication Process 6

ACTION ITEM

- ☐ Determine whether release agreements will be required in exchange for severance benefits. If so, determine what it will take to comply with the Older Workers Benefit Protection Act (OWBPA).
- ☐ Decide what the severance package will contain (e.g., salary continuation; vacation pay; continued employer paid benefits coverage; employer-paid COBRA premiums; outplacement services; counseling and résumé workshops). Identify past severance practices and be consistent.
- ☐ Gather materials necessary for RIF group meetings or one-on-one sessions (e.g., required notices, COBRA information, severance agreements).
- ☐ Conduct one-on-one sessions with affected employees. Provide information on final pay, health benefits, the COBRA election process and 401(k) options, and review the severance agreement. Encourage questions about the package.
- ☐ Hold a meeting to inform the remaining workforce of the RIF.
- ☐ Communicate to IT, facilities management and other relevant departments to follow normal termination procedures (e.g., removal from computer systems).
- ☐ Develop a RIF timeline based on the goals and objectives developed.
- ☐ Obtain legal counsel review of the downsizing plan.

FINAL STEP Ready to Talk Through Your RIF Plan?

Next Step:

Schedule a brief RIF Readiness Review with an OCM professional. We'll walk through your situation, highlight risk areas, and share best practices for supporting your people and protecting your brand.

Contact

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