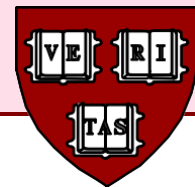


# Case Management Planner



## **What is Work Security?**

Harvard University and the Harvard Union of Clerical and Technical Workers share a strong commitment to retain staff members in our working community and especially to those employees who face job elimination due to layoff. Our negotiated Work Security Program outlines three important pieces. First, it provides layoff candidates who have a history of proven contributions to the Harvard workplace with preferential status for all Harvard jobs for which they are qualified. Second, it calls for salary and benefit continuation beyond the layoff date for up to three months, with the possibility of extension for up to three additional months if authorized by the Joint Work Security Committee. Third, the Program has designed a critical role of Case Managers to assist in the employee's re-employment at Harvard. This brochure is intended to be used as a practical guide for Case Managers and candidates.

## **What does “preference” mean for a Work Security candidate?**

Based on their history of proven contributions, laid off staff members will be given preference over outside candidates for any vacant job for which they are qualified. That means that these individuals should be hired over outside candidates and incumbent temps.

## **What constitutes enough of a job search to qualify for Work Security and/or an extension?**

An active job search includes making all reasonable efforts to apply for all relevant positions within the University as well as maintaining an active job search outside of the University. The candidate also needs to stay in regular contact with the Case Manager.

## **How can a Case Manager facilitate getting an interview for a layoff candidate?**

The HU/HUCTW contract provides that all HR offices will interview laid off employees who have applied for jobs in that unit. In addition, Case Managers should employ persistence to set up an interview with the direct hiring supervisor.

# Work Security Roles and Expectations

## **Union Member:**

- Participate actively in all phases of job search process
- Maintain regular contact with Case Manager
- Prepare updated Resume, Cover Letter, Thank-You Letter templates
- Strategize with Case Manager about appropriate range of target jobs
- Make all reasonable efforts to apply for all relevant positions within the University
- Maintain active job search outside of Harvard
- Set up and go on informational interviews; engage in networking activities
- Brush up on skills through CWD courses (career, writing, computer applications, etc.)

## **Case Manager:**

- Maintain regular contact with employee
- Assist with review of resume, cover letters, and CWD course selection
- Help identify appropriate range of target jobs
- Conduct mock interviews
- Develop a plan for informational interviews
- Contact departments with openings in support of the employee's priority candidacy
- Use persistence and persuasion to seek interviews
- Get feedback from each interview and share with employee

## **Union Representative:**

- Provide support and coaching throughout job seeking process
- Help identify appropriate range of target jobs
- Provide information about open jobs and hiring departments
- Advocate candidacy through joint network

## **HR Officer Laying off Tub:**

- Help identify skill sets
- Help identify appropriate range of target jobs
- Provide feedback about job history (no surprises)
- Advocate candidacy through HR connections

## **HR Officer Hiring Tub:**

- Interview laid-off employee
- Facilitate interviews with hiring manager(s) for qualified candidates
- Provide feedback to Case Manager
- Exercise option to waive a job posting if considering hiring a laid off employee into a comparable or higher position in your unit

# Notification Period

## Ordinarily 60 days (possibly 30 days if unexpected loss in grant funding)

- Prepare the candidate for the job search
- Plan weekly meetings or check-ins with the candidate

## Intake Meeting

The Case Manager should schedule an Intake Meeting with the employee facing layoff as soon as possible

- Clarify each other's' roles and set firm expectations; set regular schedule for communicating and meeting
- Use "*Skills Assessment Form*" and "*How Ready Are You For The Job Hunt?*" to analyze skills and job seeking abilities
- Develop a job search plan; agree on a range of appropriate positions and/or job families for which the candidate should apply
- Make a plan to outline and/or review the candidate's resume and cover letters
- Develop a skill development plan for CWD classroom courses and online courses.
- Introduce the "*Candidate Activity Tracker*" and schedule due dates
- Consider convening a Case Conference with Case Manager, Candidate and HUCTW representative
- Demonstrate the HARVie web site (Harvard Careers, Resources for Staff Facing Layoff, and CWD sections)

## Optional Case Conference

It is recommended that the Case Manager confer with the local HR Officer, (if different), Union Representative, and employee facing layoff regarding the following:

- Identify challenges to placement (if any) and a plan of action to address them (no surprises)
- Agree to amount of release time during notice period for job search activities
- Strategize what all parties will say about why the layoff has occurred

## General Case Management during Notification Period

- Finalize the candidate's resume, cover letter, and thank-you note
- Develop an "elevator pitch" and networking goals (possibly including LinkedIn page)
- Implement skill development plan
- Learn more about the candidate's strengths by speaking with past manager(s)
- Coach the candidate to:
  - Know how to search and apply for jobs via *internal gateway* in *Harvard Careers* and external job sourcing web sites
  - Designate self as a Harvard layoff in cover letters and in Harvard careers
  - Check *Harvard* email account daily and use Harvard email account when registering for courses
  - Prepare for informational and specific job interviews
  - Secure 3-5 professional references
  - Prepare for the Work Security period by setting up systems to handle voice and email messages, computer resources, internet and remote access to HARVie and Harvard Careers
  - Consider salary requirements

# Work Security Period

## Up to 90 days

- Implement the job search plan

### The candidate's role is to:

- Seek feedback from Case Manager regarding target jobs
- Make all reasonable efforts to apply for all relevant positions within the University
- Maintain active job search outside of Harvard
- Set up and go on informational interviews and engage in networking activities
- Take CWD courses and online training courses, if applicable

### The Case Manager's role is to:

- Help identify appropriate range of target jobs
- Conduct / arrange for mock interviews
- Develop a plan for informational interviews, if applicable
- Contact departments with openings in support of the employee's priority candidacy
- Use persistence and persuasion to seek interviews
- Get feedback from each interview and share with employee
- Provide a status report on candidate search to Work Security Coordinators

## Possibility of Work Security Extension

The University and HUCTW Joint Work Security Committee (JWSC) may authorize the extension of wages and benefits for up to three months beyond the initial three month Work Security period provided for in the Personnel Manual. Wage and benefit extensions will be funded centrally through the Joint Work Security Committee. The candidate must stay in regular contact with Joint Case Management Coordinators during the extension period. Applications are available through HUCTW.

The key criteria for extension: Each candidate must be in regular contact with the case manager and must apply for all relevant positions at the University in a consistent manner throughout the work security time period. In addition, candidates should apply for positions outside the University.

# Tips for Case Management

## Case Manager

### Build Your CM Skills

- Familiarize yourself with HARVie Career Development website which provides resources you can use with your candidate
- Become facile using Harvard Careers
- Attend CWD Career Development Courses – if you want fresh ideas to share with your candidate
- Know that you don't have to do it all. Refer candidate to other HU specialists and resources i.e., Benefits Services Group, CWD, recruiters, EAP, Union reps

### Job Targeting Tips

- Help candidate craft a job scope to include comparable jobs and jobs that use transferable skills
- Guide candidate to understand Basic and Additional Qualifications sections in job postings

### References and Strategies

- Suggest the candidate secure references early and have a sense of what they'll say
- Prepare candidate for 'off the record' references
- Coach the candidate through the pros and cons of accepting a particular job
- Expect last minute questions when a job offer comes in from a hiring school/unit; Respond quickly
- Investigate the possibility of bridging salary by liaising between the hiring and laying off units or the JWSC
- Consider employing candidate to cover for LOA and STD absences (putting WS benefits on pause)
- Liaise with hiring HR to develop a plan that will ensure placement success i.e., develop a new job training plan and share these costs, identify a mentor/buddy

### Prepare for Separation (if applicable)

Make sure the candidate is aware of:

- Temporary employment agency opportunities
- Resources available through the MassHire Career Centers
- HARVie's listing of "Resources for HUCTW Staff Facing Layoff"
- Union Contract regarding severance, COBRA, and other applicable benefits

## Candidate

### Credentials

- Proofread resumes and cover letters before submitting
- Craft job specific cover letters
- Prepare a list of secured references
- Have paper copies available

### Job Search Etiquette Tips

- Always follow up with a thank-you letter
- Keep a positive attitude
- Dress appropriately and respectfully
- Go for quality networking, not quantity
- Set an appointment before seeing a contact
- Be on time for appointments and interviews
- Ask permission to use a contact's name
- Research departments/organizations before applying or interviewing
- When you are a finalist, let your references know

### Job Targeting Tips

- Avoid applying to grades too high or too low
- Know how to interpret Harvard Job Postings especially: "Required, Preferred, and a Plus"
- Apply to roles for which you have at least 75% of the qualifications (including ALL the basic qualifications)
- Create a targeted LinkedIn profile and use the platform to network regularly

### Networking

- Develop a list starting with the contacts in the comfort zone; friends and colleagues
- Make LinkedIn connections with people in your area of interests and expertise

# Resources

## Internal Harvard Resources

Case Management Coordinator: Laurie Stickels, 617-384-9547, [laurie\\_stickels@harvard.edu](mailto:laurie_stickels@harvard.edu)

HUCTW Work Security Coordinator: Joie Gelband, 617-661-8289x15, [jo.gelband@huctw.org](mailto:jo.gelband@huctw.org)

- Benefits Services Group: 617-496-4001; [Harvard Benefits](#)
- Center for Workplace Development: 617-495-4985; [training@harvard.edu](mailto:training@harvard.edu);
- <https://hr.harvard.edu/career-development>
- [Harvard Ed Portal](#)
- Harvard's Employee Assistance Program: 1-877-327-4278; [EAP](#)
- Office of Labor and Employee Relations: 617-495-2786
- Computers available at CWD (Employee Resource room) and Harvard Libraries

## External Resources

- MassHire Career Centers: <https://www.mass.gov/massachusetts-career-centers>
- JVS: <https://www.jvs-boston.org/>
- Higher Ed Jobs: <https://www.higheredjobs.com/>
- LiveCareer <https://www.livecareer.com/>
- Glassdoor: <https://www.glassdoor.com/index.htm/>
- Indeed: <http://www.indeed.com/>
- LinkedIn: <https://www.linkedin.com/feed/>
- Skillscan: <http://www.skillscan.com/>
- WIND (Local Networking Groups): <http://www.windnetworking.net/>