



WRK/360



Planning for **Parental Leave**

— TRANSITION —

WORKBOOK





PLANNING FOR PARENTAL LEAVE

After sharing the news with your managers, team members and key stakeholders of your organization and reviewing all your benefits, thoroughly planning your leave will be extremely helpful for you, your family and the organization.

This worksheet can guide you on how to prepare to take time away from work as the baby (or babies!) arrive.

Here are the 10 steps for a successful planning we suggest:

STEP 1: Overview

We recommend you start 8 + weeks prior to the expected start of leave

Due Date:

Tentative Last Day Working:

Tentative Last Day in the Office:

Length of Leave/Expected Return Date:

STEP 2: Identifying Core Responsibilities

Document your processes and systems or set up workflows so peers taking over your tasks can have a clear understanding of what the tasks entail.

Include the name of the colleague you would suggest takes over this responsibility. Discuss with your manager and confirm.

Daily:

- [Item]: [name of person taking over]
- [Item]: [name of person taking over]
- [Item]: [name of person taking over]
- [Item]: [name of person taking over]



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STEP 2: Identifying Core Responsibilities (cont'd)

Monthly:

- [Item]: [name of person taking over]
- [Item]: [name of person taking over]
- [Item]: [name of person taking over]
- [Item]: [name of person taking over]

Quarterly:

- [Item]: [name of person taking over]
- [Item]: [name of person taking over]
- [Item]: [name of person taking over]
- [Item]: [name of person taking over]

STEP 3: Special or Ongoing Projects & Roles

Identify any additional or adhoc projects you are involved in. Recommend a status while your are on leave. Does it get deprioritized? Reassigned? Discuss with your manager and confirm.

Project:

Purpose:

Timeline:

Who's involved:

Status while I'm gone:

Other Notes:

Project:

Purpose:

Timeline:

Who's involved:

Status while I'm gone:

Other Notes:



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STEP 3: Special or Ongoing Projects & Roles (cont'd)

Project:
Purpose:
Timeline:
Who's involved:
Status while I'm gone:
Other Notes:

STEP 4: Prioritize or Deprioritize Responsibilities

Now that you have a good snapshot of your responsibilities, take some time to evaluate their priority and the person recommended/assigned to take over those responsibilities.

PRIORITY	MUST DO	SHOULD DO	CAN DO
	Critical & Important	Important	"Nice to have"
APPROVAL	Approval Level	Task/ Responsibility	Decision Maker
	Green	[task/ responsibility]	[make the decision]
	Yellow	[task/ responsibility]	[consult with leadership]
	Red	[task/ responsibility]	[manager]



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STEP 5: Discuss your recommendations of colleagues, direct reports, client interactions with your manager.

- **Recommendations of Colleagues**

Here is who could take on my core responsibilities:

- [Responsibility]: [name of person taking over]
- [Responsibility]: [name of person taking over]
- [Responsibility]: [name of person taking over]

- **Direct Reports**

NAME:

Interim manager/peer while I'm on leave:

Frequency of 1:1 meetings:

Notes:

NAME:

Interim manager/peer while I'm on leave:

Frequency of 1:1 meetings:

Notes:



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STEP 5: Recommendations of colleagues, direct reports, client interactions (cont'd)

- **Approvals**

Here is who could provide approvals on these items while I'm out:

- [Item]: [name of person taking over]
- [Item]: [name of person taking over]
- [Item]: [name of person taking over]

- **Client Interactions**

Here is who could take care of my clients while I'm out:

- [Client Name/Company]: [name of person taking over]
- [Client Name/Company]: [name of person taking over]
- [Client Name/Company]: [name of person taking over]

Here is who could take care of my clients while I'm out:

- [Client Name/Company]: [name of person taking over]
- [Client Name/Company]: [name of person taking over]
- [Client Name/Company]: [name of person taking over]



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STEP 6: Identifying any Gaps/Need of External Support

Task/Responsibility:

Due Date/Urgency Level:

Status while I'm gone: canceling/[Name] is running it instead of me/[Name]
is sitting in for me/Continuing as usual

Who can help:

Other Notes:

Task/Responsibility:

Due Date/Urgency Level:

Status while I'm gone: canceling/[Name] is running it instead of me/[Name]
is sitting in for me/Continuing as usual

Who can help:

Other Notes:

Task/Responsibility:

Due Date/Urgency Level:

Status while I'm gone: canceling/[Name] is running it instead of me/[Name]
is sitting in for me/Continuing as usual

Who can help:

Other Notes:



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STEP 7: Handling Communications. Working with Key Stakeholders

- **Rearranging Recurring Meetings**

Meeting:

When it Meets:

Who's in it:

Status while I'm gone: canceling/[Name] is running it instead of me/[Name]
is sitting in for me/Continuing as usual

Other Notes:

Meeting:

When it Meets:

Who's in it:

Status while I'm gone: canceling/[Name] is running it instead of me/[Name]
is sitting in for me/Continuing as usual

Other Notes:

Meeting:

When it Meets:

Who's in it:

Status while I'm gone: canceling/[Name] is running it instead of me/[Name]
is sitting in for me/Continuing as usual

Other Notes:



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- **Communication while I'm gone:**

Check on your company's communication policy while you are on leave. Some organizations restrict access.

Contact me via [email, text, or phone] for the following reasons:

- [Example Only: My direct report is leaving]
- [Example Only: Leadership / team structure changes]
- [Example Only: Critical news about our company]

STEP 8: Establishing timeline to begin transition

Tentative Last Day Working:

Tentative Last Day in the Office:

Length of Leave/Expected Return Date:
Notes:

STEP 9: Last Day in Office

If you are not taking leave before your baby's arrival, we recommend having this final-day checklist prepped at least 2 weeks before the due date.

- **Out-of-office email**
- **Client reminders**
- **Set schedule for return to work re-onboarding meetings**
- **Verify correct access granted to peers/colleagues**
- **[To do]**
- **[To do]**



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STEP 10: Check Ins & Status Updates

Depending on your government/company policies, you may not be required or expected to check in, however, we recommend scheduling at least one check-in with your manager 2-4 weeks before your return to work. Depending on your role, you may include additional check-ins / status updates.

- Schedule call with manager 2-4 weeks prior returning to work
- {Name} to provide daily/weekly/biweekly/monthly email
- {Name} to provide status updates on [project].
- [Item]
- [Item]

BONUS SECTION: Goals

Write down a few ways setting this transition plan up aligns with your own career goals and development plan.

- [Example Only: Identified ... for stretch assignment and trained them prior to my leave.
- [Example Only: Provided superior communication and handoff to clients]
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Reference Articles:

- **US Department of Labor** - FMLA Frequently Asked Questions
- **Encyclopedia on Early Childhood Development** - The Effects of Parental Employment and Parental Leave on Child Health and Development
- **Harvard Business Review** - Planning Maternity or Paternity Leave: A Professional's Guide
- **Forbes** - Why Paid Leave Is Crucial For Your Business