**EMO Disengagement**
**Transition Support Services**

| Function | Key Transition Issues |
|---|---|
| Compliance & Accountability | • Transfer all files and documentation related to authorizer accountability and reporting to bond trustee. Ensure all bond-related reports are current and borrower is in good standing. |
| Finance | • Financial reporting system and procedures.<br>• Create budget cycle.<br>• Complete time and effort reporting for current year grants.<br>• Transition grant coding.<br>• EMO to provide assistance for audit after conclusion of school year (recommend holdback).<br>• Notify all vendors.<br>• Reconcile and refunds due incl. taxes. |
| Human Resources | • Contract payout and pre-existing claims from prior year(s).<br>• Agree bonus accruals.<br>• Benefits negotiation and administration.<br>• New employee handbook.<br>• Transition HRIS. |
| Legal and Risk Management | • Notify insurance carriers.<br>• Transfer all contracts.<br>• Address outstanding litigation and related documentation.<br>• Negotiate transition agreement. |
| Operations | • Transition all facility, transportation, and foodservice contracts.<br>• Transition all vendors incl. utilities. |
| Payroll | • Transition retirement plans.<br>• Transfer payroll files, templates, personnel history.<br>• Resolve outstanding tax issues.<br>• Map general ledger and payroll accounts. |
| Procurement (for next school year) | • Create new purchasing policies and procedures, incl. petty cash and credit card policy. |
| Technology | • Identify assets to be transferred and negotiate price.<br>• Transition of student information system, scheduling, and IEP information.<br>• Transfer inventory and allowable software rights.<br>• Remove EMO applications (e.g., DNS, PERL) and transfer passwords to school. Remove web references.<br>• Set-up email and directories.<br>• Disconnect EMO T-1 and establish new connection, filtering, etc.<br>• Ensure e-rate continuity and tech plan transition.<br>• Transition phone service.<br>• EMO to update and transfer historical gradebook information.<br>• Library management system.<br>• Formative assessment systems including data extract of historical information. |