

**EMO Disengagement
Transition Support Services**

Function	Key Transition Issues
Compliance & Accountability	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Financial reporting system and procedures. • Create budget cycle. • Complete time and effort reporting for current year grants. • Transition grant coding. • EMO to provide assistance for audit after conclusion of school year (recommend holdback). • Notify all vendors. • Reconcile and refunds due incl. taxes.
Human Resources	<ul style="list-style-type: none"> • Contract payout and pre-existing claims from prior year(s). • Agree bonus accruals. • Benefits negotiation and administration. • New employee handbook. • Transition HRIS.
Legal and Risk Management	<ul style="list-style-type: none"> • Notify insurance carriers. • Transfer all contracts. • Address outstanding litigation and related documentation. • Negotiate transition agreement.
Operations	<ul style="list-style-type: none"> • Transition all facility, transportation, and foodservice contracts. • Transition all vendors incl. utilities.
Payroll	<ul style="list-style-type: none"> • Transition retirement plans. • Transfer payroll files, templates, personnel history. • Resolve outstanding tax issues. • Map general ledger and payroll accounts.
Procurement (for next school year)	<ul style="list-style-type: none"> • Create new purchasing policies and procedures, incl. petty cash and credit card policy.
Technology	<ul style="list-style-type: none"> • Identify assets to be transferred and negotiate price. • Transition of student information system, scheduling, and IEP information. • Transfer inventory and allowable software rights. • Remove EMO applications (e.g., DNS, PERL) and transfer passwords to school. Remove web references. • Set-up email and directories. • Disconnect EMO T-1 and establish new connection, filtering, etc. • Ensure e-rate continuity and tech plan transition. • Transition phone service. • EMO to update and transfer historical gradebook information. • Library management system. • Formative assessment systems including data extract of historical information.