

Navigating Office Turnover with Confidence

Strategies for stability, knowledge retention, and
successful transitions

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Introductions

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The Challenge of Turnover

- Turnover happens
 - retirements,
 - promotions,
 - career changes,
 - life events
- In small offices, one departure can disrupt multiple workflows.
- The goal: Reduce chaos, preserve knowledge, and rebuild stronger.



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What Happens When Turnover Hits

- Delayed processing (e.g., payroll, vendor payments)
- Loss of 'how we've always done it' knowledge
- Stress on remaining staff
- Reduced confidence among stakeholders



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Building Confidence Through Preparation

- Turnover is inevitable — chaos isn't.
- Prepare the office so transitions feel like a handoff, not a crisis.
- Core tools: Cross-training, Business Office Handbooks, Clear Communication with the Business Office and with all staff.



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Cross-Training Essentials

- Purpose: Ensure coverage and continuity.
- Identify critical functions (payroll, accounts payable, purchasing, HR).
- Map out who knows what and develop shadowing routines.
- Use checklists for daily, monthly, and annual tasks.



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Example Cross-Training Matrix

- Task | Primary | Backup | Frequency | Notes
- Payroll Processing | Laura | Dan | Bi-weekly | Backup trained via simulation runs
- Purchase Orders | Maria | Laura | Daily | Include Standard Operating Procedures in handbook
- Accounts Payable | Laura | Maria | Weekly | Keep vendor list updated



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Business Office Handbooks

- Purpose: Capture institutional knowledge.
- Each area (Purchasing, Payroll, AP, HR, Student Activity Funds) should include:
 - Overview of process and purpose, step-by-step procedures, key contacts, timelines, troubleshooting tips.
 - Store handbooks in shared drives or intranet for easy access.



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Example Handbook Outline – Payroll

1. Payroll Calendar
2. Entry and Review Procedures
3. Timesheet and Overtime Rules
4. Error Correction Steps
5. Reporting Requirements (IMRF, TRS, IRS)
6. End-of-Year Processing (W-2, 1095-C)
7. Contact List



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Knowledge Capture Strategies

- Use exit interviews for process handoffs.
- Record screen walkthroughs or write step-by-step guides.
- Keep 'How-To' videos or screenshots for complex software.
- Use shared folders, not personal drives.



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Supporting New Staff

- Welcome packet with office structure, calendars, and acronyms.
- Pair new staff with a mentor.
- Allow 'learning grace' periods and phased responsibility.
- Check-in frequently during first 30, 60, 90 days.



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Strengthening the Team

- Encourage collaboration, not silos.
- Celebrate institutional knowledge.
- Hold quarterly process refresh meetings.
- Keep documentation alive and updated.



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West Chicago High School District 94 Story

District 94 is a one high school district with 2,000 students, 160 teachers and is based in DuPage County serving West Chicago, Carol Stream and Winfield.



When I started in 2019

District/Business Office Staff	Years of Service in 2019	Years of Service Now
Business Office Supervisor	29 (retired in 2024)	1.5
Payroll	17 (retired in 2025)	.5
Accounts Payable/PO	21 (retired in 2024)	1.5
Administrative Assistant	19 (retired in 2025)	.75
Cashier (newly created position)	N/A	1.5
Total Years of Service	86	5.75



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Fox Lake Story



District 114 is based in northwestern Lake County, Illinois (serving the area around Fox Lake, Illinois and some surrounding areas).

Lotus School:
Pre-K through 4th grade,
located in Spring Grove.



Stanton School: Grades 5-8, located in the Fox Lake portion of Lake County.

District/Business Office: Current	District Business Office: Last Year
Superintendent	Superintendent
Director of Business Services (Assumed Role July 1)	Business Manager (Retired end of June)
Payroll/HR Specialist	Payroll/HR Specialist
Administrative Assistant	Administrative Assistant
- Jan. will look for someone part time .25	.5 Accounts Payable (left in July)
Beginning to Transition: bus driver that can work in between routes (stipend)	.5 Transportation Director (left in July)
Beginning to Transition: food service leads at each school (overtime hours)	1.0 Food Service Director (left in June)



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Discussion & Q&A

- How many people are cross trained with someone else in your office?
- What turnover challenges has your office faced?
- What made transitions good or bad?
- How do you currently document key processes such as handbooks?
- What ideas can you implement next week?



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Key Takeaways

- Turnover = Opportunity to improve and find efficiencies.
- Find available and relevant training
- Cross-training builds confidence.
- Have a transition period whenever possible
- Handbooks preserve knowledge.
- Communication keeps teams resilient.



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Questions and Answers

We thank you for your time!



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