# 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.



#### **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



## **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.

## **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.



#### **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



#### **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.



## **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





## **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.



## **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.





#### **Strengthening the Team**

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





## **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





## **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)





#### **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?



#### **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.



## Questions and Answers

We thank you for your time!

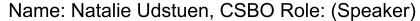




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