

Separating from a Position Worksheet

As outlined in Policy GBOC (Negotiated Agreement) when vacating a position of employment with the Olathe Public Schools, the departing employee shall be required to work with their immediate supervisor to implement a smooth transition of job position/responsibilities, and transfer of critical information/documents.

The departing employee shall be responsible for completing the following components, to the satisfaction of the immediate supervisor.

1) **Schedule and meet with the immediate supervisor regarding current responsibilities & exit expectations** for purposes including, but not limited to:

- describing status of current projects / initiatives / budget / action plans
- describing upcoming events / time lines/ contacts of significance / critical & immediate deadlines
- reviewing expected format of critical information, files, documents, to be left and reviewed with incoming person
- discussion of how final days on the job will be spent regarding transition activities including work with others in same office or division
- discussion of any intended absences immediately prior to separation from employment
- clarifying supervisor expectations regarding transfer of keys, communication devices(i.e. computer, cell phone, iPad, etc), identification badges, other items "checked out" to the individual
- explanation by the supervisor about termination of email, building access, file access
- description of any copies of documents, files, products, or materials that the departing employee plans to take with them, with explanation for requesting approval
- other supervisor requested updates, descriptions, or discussions regarding continuation of operations in the exiting employee's areas of responsibility

2) **Provide the supervisor with print or electronic documentation and resources**, including but not limited to:

- locations of critical contact information for the job function
- locations of information on routine reports, procedures, process documents
- providing documented description of where to locate key information, materials, resources
- original documents of products/publications/or other intellectual property developed for district use or publication, with use of district resources and district funded
- other locations, formats, and descriptions of information requested by the supervisor regarding continuation of operations in the exiting employee's areas of responsibility

Also if applicable for this employee's position:

- locations of any documentation of legal matters, anecdotal records on student performance, or records of incidents past, or in progress

3) **Develop and gain approval for a succession plan, including meeting with the successor when possible.** The plan shall include, but not be limited to:

- A draft overview of what materials will be provided to the incoming replacement
- If applicable, the date, time, and place of the transition meeting or meetings & topics to be discussed
- A plan for handling routine follow-up via calls, email, or visits regarding first-year questions that may arise after the new person takes over responsibilities

In cases when the replacement is not yet determined, or is unavailable to meet prior to separation with the departing employee, the above procedures may be amended as follows:

- The supervisor of the departing employee shall consult with an HR Administrator regarding the above outlined aspects of this procedure that would be required in lieu of a face-to-face meeting between departing and incoming employees.
- Conference call, direct call, or video conferencing may be discussed as an option to achieve the intended outcomes of the transition plan

4) **The supervisor and departing employee sign below stating components 1-3 will be completed prior to ending employment.**

Supervisor signature

date

Employee signature

date