Separating Employee Documentation of Work and Institutional Knowledge

This worksheet is intended as a guide for the employee that is separating, to document their work and their institutional knowledge. (Note: Depending on the nature of the work, it may also be helpful to create more detailed process guides for specific tasks.)

This should be completed by the employee who is separating. It may be modified to meet departmental needs.

Employee Name: _____ **Department:** _____

Title: _____ **Appropriate Administrator:** _____

Departure Date: _____

Tasks in process, upcoming projects, and next steps:

Task / Project	Status	Next Steps	Key Collaborators	Contact Information

Calendar of events and meetings - Upcoming One-time and Recurring:

Event / Meeting	Date(s)	My Role / Responsibilities in This Event / Meeting	Key Collaborators	Expected Attendees

Key partnerships and relationships (On-campus and Off-campus):

Partner(s)	Nature of Relationship	Contact information	Notes

Key accomplishments during my time at CSU Channel Islands:

Topic	Details / Insights / Recommendations

Recommendations for the future of my work and the work of this department / college:

Topic	Recommendation

Other helpful information you may want to provide:

Where key documents/files can be found, electronic and/or hard copy

Organizations, communities of practice, ListServs and other groups I've participated with:

Electronic tools, websites and other resources not housed in the campus:

Other information not otherwise included in this form:

Thank you for investing the time to share this information and your insights!