



Retirement from Paid Employment: Checklist & Information

If at any point during this process you have questions, please contact your Field Support Center Personnel Representative by phone or by email at FSC.Personnel@navigators.org.

Please print this checklist and review it with your supervisor.
Items with a checkbox are action items you need to complete.

- Retirement Email:** Please email your supervisor and FSC.Personnel@navigators.org and be sure to include the following information:
1. Your preferred last day of work including a resignation reason of “Retirement.”
 - a. The FSC Personnel Team will then communicate back to you regarding an end date that will coincide with the end of a pay period.
 2. If you intend to remain on staff as a volunteer/NavAssociate, please also state this in your retirement email. If this is the case, you may still see some automated communication from Workday that might mention a “termination” with The Navigators. Please do not be alarmed, as it only means an end to your paid employment with The Navigators. You can still continue as a volunteer/NavAssociate after that communication has been sent.
 - a. **Please be aware that upon transitioning to a NavAssociate, you will no longer have access to payroll data in Workday, including previous pay stubs and W2’s.**
If you need to access payroll information, please contact Payroll@navigators.org.
 3. If you are married and your spouse is also on staff (either paid or NavAssociate), please notify us if he/she is no longer going to be on staff.
- Benefits:** If you are full-time paid staff (20 hours/week or more), your Navigators insurance coverage and all other benefits will end on the last day of the month in which you resign, no matter which date in the month is chosen as your last day of employment. Even if you have an ending date early in a month, benefits charges will still be paid from your account twice that month. Please see the attached COBRA chart for more information. If you have questions about your benefits, contact Benefits at Benefits@navigators.org. You can also learn more about the Retirement Journey here: <http://www.navbenefits.org/life-stages/nearing-age-62-and-beyond/>
- Fidelity:** Please wait until the middle of the month after your retirement date (*enter date here*) before contacting Fidelity about distributing funds. [*For example, if your last day is May 9 and your final paycheck is May 15, you would wait until June 15 to contact Fidelity. If your last day is February 29 and your final paycheck is March 6, you would wait until April 15 to contact Fidelity.*] If you have questions regarding Fidelity please contact our Fidelity representative at Ross.Hoskins@fmr.com.

☐ **NavOffice (Email, Files, and Office 365):** If you are leaving paid staff *and* closing your cost center (so that you will neither be an employee nor a NavAssociate), all of your access to NavOffice, your @navigators.org email, and any files you have stored within Office 365 through The Navigators will be shut down and you will lose access on your last day of work. Please make sure to migrate any important information before your last day.

☐ **P-Card Inactivation:** All p-cards are automatically inactivated 2 weeks prior to your last day of employment (For example: if May 9th is your last day of employment, your p-card will no longer work beginning on April 25th). This means that any ministry expenses that you have during this period will need to be paid for out-of-pocket and submitted for reimbursement on your Workday expense report before your last day of work.

☐ **Submit a Final Workday Expense Report:** Before your last day of work you will need to submit your last expense report. ***Please make this a priority before your last day of work.*** As soon as your final purchase has shown up, you can complete and submit a final report. If you are unable to submit all your expenses prior to your last day, please contact AP.Team@navigators.org to notify them of the names and amounts of any outstanding expenses on your p-card.

☐ **Complete Exit Survey:** You will be receiving an email from Human Resources asking you to provide feedback about your employment experience. Your feedback is very important to leadership, so please make it a priority to complete this survey. If you wish, you can also indicate your desire to meet with Mission leadership and/or Human Resources on the survey.

☐ **Communicate with Your Donors:** If you are retiring and haven't done so already, please make sure to mail your final newsletter and clearly communicate with your donors what your future plans are. What you communicate to your Donors depends upon the health of your Navigator cost center account and whether or not you have the funds to end your employment with a positive balance. If your account is in a deficit, you may want to ask your donors to continue giving after your end date to clear up the deficit in your account. Please contact FSC.Personnel@navigators.org for donor letter templates.

Please note: All of your donors that give by EFT, Recurring Credit Card, or by check will need to be contacted directly by you. The Navigators is **not** able to return any donations if you fail to inform your donors of your departure. Please help represent The Navigators well by communicating clearly with your donors. Before advising your donors on how to stop their giving, please consider asking them to switch their giving to another Navigator staff member.

☐ **End Recurring Donations:** Please request that FSC.Personnel@navigators.org stop any automatic recurring donations from your donors AFTER:

1. you have already communicated with your donors that you are leaving staff,
2. your account has sufficient funds to end in a surplus after your end employment date, and
3. you have given your donors the option to call Donor Services at 1-866-568-7827.

The donation end date stop will vary depending upon Donor Services processing dates, typically within 2 to 4 weeks of being notified. Your recurring donations will not automatically stop; the action must be requested.

☐ **Account Balance/Deficit:** After you have finished service with The Navigators, you will be given up to 90 days after your separation date to fundraise for any deficit you might have. Any remaining positive balance will be divided per The Navigators policy. If you are age 62 or older and if you have been on paid staff with The Navigators for 10 years or more, you are eligible for an honorarium of 1/3 of the surplus in your ministry account, up to \$7,500. This service award will be paid out automatically on your final paycheck.

☐ **Keep Your Address Updated with The Navigators:** Because you have been employed with The Navigators in this calendar year, we are required to mail you a W-2 form in January of next year. If we do not have the correct mailing address for you, you won't be able to file your taxes. Even when you are no longer employed by The Navigators, it is critical that you send us any new address changes. Please send those changes to HR.Inbox@navigators.org.

☐ **Navweekly:** Please provide your most updated non-Navigator email to FSC.Personnel@navigators.org to continue being able to stay connected by receiving *Navweekly*.

☐ **Transfer to Caleb Group:** If you are age 62 or older and if you have been on staff with The Navigators for 10 years or more and if you have recently retired and if you have closed your ministry account, you are eligible to join the Caleb Group. In addition to the relational benefits of being in Caleb Group, members receive continued access to Glen Eyrie, NavPress discounts, a membership card, and the Caleb Group newsletter. Enrollment in Caleb Group is automatic upon retirement and is available to spouses of retired or deceased staff.