



Retirement from Paid Employment: Checklist & Information

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. **End date (i.e., your last day):** Your preferred last day of work including a resignation reason of “Retirement.” 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. **Nav Associate Staff:** If you intend to retire to Nav Associate staff (i.e., remain on staff as an unpaid volunteer/Nav Associate with a cost center for ministry expenses), 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 will continue to be on staff as an unpaid Nav Associate after that communication has been sent. **Please be aware that upon transitioning to a Nav Associate, 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. **Spouse Paid/Nav Associate Staff:** If you are married and your spouse is also on staff (either paid or Nav Associate), please notify us if he/she is no longer going to be on staff.
4. **Staff to assign 1/3rd of any surplus funds in your cost center to if you fully retire.** Please note that we must know which staff to assign 1/3rd of your account balance to by the last day of your employment. If you fail to provide us with that information, 2/3rds of any remaining surplus in your cost center will be assigned to your mission’s Staff Assistance Fund.

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: <https://www.navbenefits.org/retirement-benefits/>

P-Card Deactivation: 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. Your cost center will stay open for 8 weeks and in that time your donors will receive an appeal to give to another Navigator staff or ministry serving in your current mission. If your cost center is in deficit, donations that are sent in during this 8 week period will go towards the resolution of your deficit. If your donors would like to end their gifts, they can do so by contacting the Ministry Partner Care team at Ministrypartnercare@navigator.org, calling (866) 568-7827 (toll free), or by logging into their donor page. **Please note:** The Navigators does **not** stop any donations unless your donors request that they be stopped and is **not** able to return any donations. Please help represent The Navigators well by communicating clearly with your donors.

Ministry Account Balance: Any remaining positive or negative balance will be divided per The Navigators End Staff Distributions policy, which is as follows for staff who are fully retiring and thus, closing their account (i.e., not retiring to Nav Associate staff):

- 1/3rd: to staff of your choice
 - Note: we need to know which staff to assign 1/3rd of your remaining surplus to by your end date. Otherwise, any surplus will be sent to your Missions Staff Assistance Fund.
- 1/3rd: to your missions Staff Assistance Fund
 - If you are retiring from the Encore Mission, \$500.00 will be sent to the Caleb Group
- 1/3rd: Optional Honorarium if you qualify
 - If you are age 62 or older and have been on paid staff for 10+ years, 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.
- If you do not qualify for an honorarium, any remaining surplus in your cost center can be divided 50/50 between staff of your choice and your mission's Staff Assistance Fund.

NavOffice: (email, files, and Office 365): If you are leaving paid staff entirely (so that you will neither be an employee nor a NavAssociate), all of your access to NavOffice, your @navigator.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.

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

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@navigator.org.

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.