



## Retirement Checklist & Information

**Please print this checklist and review it with your supervisor.**

### Required Steps

- Retirement Email:** Please email your supervisor and [FSC.Personnel@navigators.org](mailto: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 HR Offboarding Specialist will then communicate back to you regarding an end date that will coincide with the end of a pay period. You can also view pay period dates on the [payroll schedule](#) for your reference.
  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, as well as if you plan to continue fundraising and receiving donor income. 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 W-2s.** If you need to access payroll information, please contact [Payroll@navigators.org](mailto: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 1/3<sup>rd</sup> of any surplus funds in your cost center to if you fully retire.** Please note that we must know which staff to assign 1/3<sup>rd</sup> of your account balance to by the last day of your employment. If you fail to provide us with that information, 2/3<sup>rd</sup>s of any remaining surplus in your cost center will be assigned to your mission's Staff Assistance Fund.
  
- Submit a Final Workday Expense Report:** Before your end date, 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](mailto:AP.Team@navigators.org) to notify them of the names and amounts of any outstanding expenses on your p-card.
  
- P-Card Inactivation:** All p-cards are automatically inactivated 2 weeks prior to your last day of employment. This means that any ministry expenses that you have during this period will need to be paid out-of-pocket and submitted for reimbursement on your final expense report before your end date. If you become a Nav Associate, you will not have access to your p-card but will also be able to reimburse yourself for ministry expenses paid for out-of-pocket.
  
- Benefits:** If you are Benefits eligible (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](mailto:Benefits@navigators.org).

### Information to be Aware of

**Confirmation of Job Description and Supervisor:** If you will be transitioning to a Nav Associate when you retire, you will need to connect with your supervisor and create an updated job description using the [Field Staff Job Description Templates](#) provided. Please sign and date it with your supervisor and send a copy to the Offboarding Specialist at [FSC.Personnel@navigator.org](mailto:FSC.Personnel@navigator.org), along with confirmation of who your supervisor will be.

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

- 1/3<sup>rd</sup>: to staff of your choice
  - Note: we need to know which staff to assign 1/3<sup>rd</sup> of your remaining surplus to by your end date. Otherwise, any surplus will be sent to your mission's Staff Assistance Fund.
- 1/3<sup>rd</sup>: to your missions Staff Assistance Fund
  - If you are retiring from the Encore Mission, \$500.00 will be sent to the Caleb Group
- 1/3<sup>rd</sup>: 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.

**Communicate With Your Donors:** If you are retiring, make sure to mail your final newsletter and clearly communicate to your donors what your plans are. If your donors wish to stop their gifts, they may do so by contacting Ministry Partner Care at [Ministrypartnercare@navigator.org](mailto:Ministrypartnercare@navigator.org), calling at (866) 568-7827 (toll free) or by logging into their donor page. The Navigators does **not** cancel donations and is **not** able to return any donations if your donors continue their donations.

**Uplift Program for Your Donors:** If you are retiring from staff entirely, your cost center will stay open for eight weeks (regardless of surplus/deficit status) and in that time your donors will receive an appeal to give to another Navigator staff serving in your mission. If you are retiring to Associate staff but will not continue to fundraise, your donors will also receive an appeal to give to another Navigator staff, but your cost center will remain open. The Navigators does **not** automatically cancel donations and is **not** able to return any donations if your donors continue their donations.

**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, 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.

**Keep Your Address Updated with The Navigators:** Because you have been employed with The Navigators within 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 [Staff.Services@navigator.org](mailto:Staff.Services@navigator.org).