



Augusta Health Leader Retirement Guide

2025-2026 Retirement Guide

Introduction

Retirement represents a pivotal moment in a team member's journey. As a leader, your role plays a critical part in ensuring a seamless transition. This guide is designed to empower you with the tools to navigate this process effectively, with a dual focus on fostering a meaningful experience for the retiree, as well as safeguarding the uninterrupted operations and well being of remaining teammates and our Augusta Health organization.

By following these processes, you can create a retirement experience that not only is marked by respect and memorable moments, but also contributes to ongoing success for you and your team.

With thanks for your partnership,

Your Organizational and Talent Development Team



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Retiree Tiers

Recognizing the significance of your retiree's contributions, our retirement portfolio comprises five tiers, each tailored to commemorate your retiree's years of service.

Our retirement portfolio is available to all August Health retirees, including contracted teammates, who are at least 55 years of age. Each tier reflects the tenure of your service.

Tier	Years of Service	Organization Wide Announcement	Catered Celebration	Cash Bonus	Gift
1	0-4	Yes	-	-	-
2	5-9	Yes	Yes (Small)	-	-
3	10-19	Yes	Yes (Medium)	Yes (Small)	Yes
4	20-29	Yes	Yes	Yes	Yes
5	30+	Yes	Yes	Yes	Yes

Please note:

Value is based on attendee count of 25 guests. This amount will be charged to a special retirement account. Should you need catering for additional guests, the additional costs will be charged to your cost center.

Retirement catering is a set menu (not a la carte) See Appendix for retirement menus.

Leader Responsibilities

Retirement Initiation

Begin discussing retirement plans with team members well in advance. Encourage open and honest communication and address any concerns or questions they may have.

- Submit the retirement initiation form on the [Investing in Us](#) Website as soon as a team member mentions retirement. You do not have to have exact dates confirmed yet to submit the form.

The Organizational and Talent Development Department (OD) will confirm eligibility and begin the retirement process. This involves contacting the following departments.

- ✓ Total Rewards: To schedule a meeting with the retiree to review PTO payouts, health and financial benefits and porting
- ✓ Talent Acquisition: To connect with you as the leader to complete the PAF and begin the hiring process
- ✓ Volunteer Services: To connect with the retiree regarding future volunteer opportunities

- Ensure your retiree receives their Retirement Portfolio.
 - ✓ Organizational Development will e-mail both you and your retiree the Retirement Portfolio. Please ensure your retiree has access to their e-mail.
- Confirm with your retiree whether they would like an announcement and/or reception (if eligible; Organizational Development will confirm with you).

Announcement

- If the retiree would like an announcement, send details to Organizational Development.
 - ✓ Organizational Development will e-mail you the standard template. Engage the team member or other teammates to tell their story.

Leader Responsibilities (continued)

Retirement Reception (if eligible)

- If your retiree would like a reception, let's make it special! Coordinate a time and location, then send the details to Organizational Development. We'll handle the rest—as long as we receive the info at least 7 business days before the big day to ensure we can support the event. (Please note: If this deadline is missed, departments will handle their own arrangements for celebrating their retiree.)

Include:

- ✓ Date, time and location
- ✓ How many guests will be invited
- ✓ Retiree's favorite color
- ✓ Preference of cookies or cake
- ✓ For tier 3, preference of meatballs or chicken wings

Please note:

- ✓ Organizational Development will book the conference room (if applicable) and submit the catering request.
- ✓ Decorations are the responsibility of the leader/team.
- ✓ Consider ways to personalize the reception:
 - Include other people special to the retiree (significant other, children, former teammates, mentors, et cetera).
 - Engage the team for fun and creative ideas to personalize the reception and make it memorable.
 - Don't make assumptions. Always ask the retiree or seek guidance from trusted teammates as to what is appropriate and will be appreciated by the retiree.

Transition Process

- Partner with the retiree in the transition process, including training their successor, organizing their work and updating procedures.
- Establish a centralized repository for storing documented knowledge, making it easily accessible to relevant teammates.
 - ✓ Ensure this repository is well-organized and searchable.
 - ✓ Document:
 - Technical expertise
 - Processes and procedures knowledge
 - Client relationships
 - Best practices
 - Institutional history

Leader Responsibilities (continued)

Retiree's Last Day

Return all company items:

- ☐ Computers
- ☐ Mobile devices
- ☐ Access cards
- ☐ Keys
- ☐ ID Badges
- ☐ Parking passes
- ☐ Important documents, files, records, manuals and handbooks
- ☐ Uniforms
- ☐ Security fobs
- ☐ Credit cards
- ☐ Office supplies
- ☐ Tools and equipment
- ☐ Company owned vehicles
- ☐ Software and licenses
- ☐ Safety equipment
- ☐ Personal protective equipment
- ☐ Materials borrowed from a resource center

- ✓ Assist the retiree in setting up e-mail forwarding or an out-of-office message to redirect correspondence to the appropriate teammate.
- ✓ Disable and revoke access to all systems, e-mail and other sensitive information.
- ✓ Ensure exit documentation, such as resignation letters or retirement paperwork, has been completed and filed appropriately.
- ✓ Make the retirement experience respectful and memorable, showing gratitude for their service and leaving a positive impression of our organization.

Appendix

Retirement Reception Menus

Tier	Years of Service	Catered Celebration Event	Catered Celebration
2	5-9	Valued at \$100	<ul style="list-style-type: none">• Floral arrangement• Punch• Either cake or cookies
3	10-19	Valued at \$200	<ul style="list-style-type: none">• Floral arrangement• Punch• Either cake or cookies• Vegetable tray with dip• Fruit and cheese tray with dip• Either meatballs or chicken wings
4-5	20+	Valued at \$300	<ul style="list-style-type: none">• Floral arrangement• Punch• Either cake or cookies• Vegetable tray with dip• Fruit and cheese tray with dip• Meatballs• Chicken wings• Chips and dip• Shrimp

Reminder:

The value is based on having 25 attendees. This expense will be charged to a dedicated recognition account. If you require catering for more guests, the extra charges will be charged to your department.

Human Resources Contacts

Compensation

Contact the Compensation team regarding job descriptions and pay structures

Ashleigh Brown

Sr. Compensation Analyst

 AEBrown@AugustaHealth.com

Matt Caldwell

Sr. HR Data Analyst

 MECaldwell@AugustaHealth.com

Talent Acquisition

Contact the Talent Acquisition team regarding personnel action forms, the hiring process and preboarding/onboarding

Sherri Carter

Director of Talent Acquisition

 (540) 836-0069

Organizational and Talent Development

Contact the Organizational and Talent Development team regarding the retirement announcement, reception and gift

Amanda Herndon

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Organizational Development Specialist


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Human Resources

For all other general questions

 HumanResources@AugustaHealth.com

 (540) 332-4700