



Tuition Assistance Policy

February 1, 2016

Niagara Bottling, LLC ("Niagara") offers the Tuition Assistance Program for eligible Team Members who pursue an accredited undergraduate/graduate course of study or nationally recognized certificate program. This program is offered as a benefit to Niagara Team Members and any tuition assistance made pursuant to it shall be made at Niagara's sole discretion. This policy may be modified from time to time with or without notice, at Niagara's sole discretion.

Team Member Eligibility

A Team Member is eligible for the Tuition Assistance Program provided they meet the following eligibility criteria:

1. Team Member successfully completes one year of continuous full-time employment prior to applying for tuition assistance.
2. Team Member received at least an overall "Achieves Expectations" on all formal feedback over the prior 12 months.
3. Team Member has not been on a Corrective Action in the prior 12 months or at the time of submitting a Tuition Assistance application.
4. The education program must be towards a certificate or degree that is related to and will enhance the Team Member's current job or position.
5. The degree must be from an accredited university or must be a nationally recognized program.
6. Team Member must receive approval from Human Resources verifying that they meet these eligibility requirements.

Application Process

Before starting any program or class, the Team Member must obtain **prior approval** for tuition assistance. Team Member must submit:

1. A completed Tuition Assistance Application.
2. Explanation as to why the course or program will enhance Team Member's current position.
3. A Program or Course Plan, including but not limited to a breakdown of courses by semester (or quarter) and estimated costs for each course.
4. The estimated total cost of the program or course and estimated time of completion.
5. Any other information that Team Member believes is necessary for the evaluation and approval.
6. If and when Application is approved, Team Member will be required to sign a Promissory Note before any tuition assistance is disbursed.



Tuition Assistance Criteria

The Tuition Assistance Program is designed to help Team Members continue their education and to further enable them to grow in their existing job or position.

1. NOT to Qualify Team Member for a New Trade, Business or Position

The course or program must not be one that facilitates Team Member’s career change or enables Team Member to perform substantially different tasks or completely unrelated duties.

Ph.D. programs will not qualify for Tuition Assistance.

2. Ongoing Eligibility

- a. While receiving tuition assistance, Team Member must maintain eligibility requirements such as:
 - At least an “Achieves Expectations” on all feedback communication.
 - Shall not be placed on any corrective action at any time.
- b. Team Member must remain on active status while receiving tuition assistance benefits.
- c. Team Member must adhere to the Program Plan as outlined in the Application. Any changes must be submitted in advance and is subject to review and additional approval.

3. Program Guidelines

The following program guidelines apply:

- For purposes of calculating the annual cap, the plan year begins January 1 and ends December 31. The annual cap applies to the year in which the disbursement is paid, not the year in which the expenses were incurred. Unused tuition assistance allotments do not carry forward into the next calendar year.

	% Assistance	Annual Cap	Lifetime Cap
Undergraduate or Non- Degree Program (i.e. Certificate)	50%	\$5,000	\$20,000
Graduate	50%	\$7,500	\$22,500

- The amount of assistance will be reduced if Team Member is receiving funds from other sources, including but not limited to scholarships and government sponsored grants.
- Approvals are valid only for the classes specifically approved on the application. Any amendments to the application must be reviewed and is subject to approval.
- All classes must be taken for a letter grade whenever possible.
- All tuition assistance is subject to federal and state tax regulations.



4. GPA/Program Completion Requirement

General Requirements:

- Team Member must be in good academic standing at all times during the program.
- Team Member must maintain a cumulative grade point average of 2.0 or above to receive all or partial tuition assistance at the approved threshold.

Team Member’s final grade in each class correlates with the amount of tuition assistance as follows:

GPA for each course	% of Award Amount*
3.0 – 4.0	100%
2.0 to 2.99	50%
1.99 and below	0%

* Award amount % is paid based on the allotted tuition assistance amount listed above under Program Guidelines

- Where a GPA system is not applicable, Team Member must complete and pass the program previously approved by earning a certificate or showing proof of completion.
- Failure to fully complete or pass a course or program will result in disqualification for tuition assistance.

Reimbursement Procedures

Team Member shall pay for the course or program at the commencement of such course or program. Upon satisfactory completion, Team Member shall submit a request for reimbursement within 90 days of completing the course or program. Team Member must submit the following documents for payment:

1. Proof of tuition payment (Registrar’s receipt, cancelled check, credit card receipt, etc.).
2. Team Member’s transcript showing satisfactory GPA, proof of grade for the class, or certificate of completion.
3. Any other documents as required by Niagara.
4. Payment rendered within 30 days of receipt- next scheduled on-cycle check

Retention and Repayment

Team Member must complete one year of full-time employment with Niagara after each tuition assistance disbursement before each disbursement is fully vested.

Should Team Member fail to maintain active employment with Niagara for one year after a tuition assistance disbursement, Team Member acknowledges and agrees that such disbursement(s) shall be accelerated and become immediately due and payable to Niagara.



In the event Team Member's employment is terminated (by either Niagara or Team Member, with or without cause) before meeting the tenure requirement, Team Member must repay Niagara any tuition assistance amount.

Temporary SOP

Until online portal goes live.

1. Team Member completes application and submits to HRM for review.
2. HRM reviews and approves.
3. HRM to discuss with Manager and receive Manager approval.
4. HRM communicates tuition assistance application to leadership (Director/VP).
5. HRM forward completed and approved application to Brian Furlow.
6. Brian Furlow works with Tax department to determine tax classification.
7. Brian Furlow communicates to HRM once approved and sends Promissory Note to be executed.
8. HRM sends executed Promissory Note back to Brian Furlow.
9. Once Team Member completes the course, Team Member submits request for reimbursement via iExpense along with supporting documentation within 90 days of course completion.
10. Payment processed through Payroll or AP, as applicable.