



Effective Date: 4/1/2025

Supersedes Policy Dated: 1/1/2016

Approved By: Paula Hubbard
Paula Hubbard (Mar 19, 2025 15:33 CDT)

HUMAN RESOURCES POLICY AND PROCEDURES

Educational Assistance Policy

PURPOSE:

This policy is to encourage teammates to improve skills and prepare for greater responsibilities by providing financial assistance for payment of tuition, books, and other approved education expenses.

APPLIES TO:

This policy applies to McLane Home Office, Retail, and Restaurant (excluding CD Hartnett) teammates.

EXCEPTIONS:

Exceptions to this policy require the approval of the Chief Human Resources Officer (CHRO) and Regional Vice-President (RVP) or Corporate Officer. Exceptions will be made if state law otherwise governs any aspect of this policy. McLane reserves the right to change or modify this policy at management's discretion.

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POLICY GUIDELINES:

I. Eligibility

- A. Regular full-time teammates who have successfully completed the 90-days of employment.
- B. Teammates who are actively employed at the time of registration and throughout the completion of the course.
- C. Teammates must sign the Educational Pre-Approval & Reimbursement Form (Addendum 1) along with a Repayment Agreement (Addendum 2) before receiving any payment under this policy.

II. Maximum Annual Reimbursement

\$5,250 each calendar year

III. Expenses Eligible for Reimbursement

- A. Registration and tuition costs
- B. Required textbooks
- C. Lab or equipment fees that are required to successfully complete the course

IV. Course Approval Criteria

- A. Courses must be part of an approved college curriculum that will be accredited at the time the degree will be received.
- B. To determine if the teammate's college selection and course of study is accredited, the teammate's leadership will ensure the institution being requested is accredited through an approved Department of Education Regional, Institutional, or Specialized accrediting agency. The U.S. Department of Education database link of accredited post-secondary institutions and programs is below:

[DAPIP | Homepage](#)

- C. Associate, Bachelors, Masters, and Doctorate college degrees being sought by the teammates shall be approved by their Department Head and will be in a course of study that benefits the teammate's career growth and is a course of study that aligns with the needs of McLane Company. Examples include but are not limited to courses related to business, management, IT, data science, administration, accounting, logistics, supply chain, and HR.
- D. Training programs, certifications or courses that are not part of a college curriculum will not be approved for payment or reimbursement under this policy. This includes certification and licensing programs. Non college courses or programs should be submitted to the teammate's Department Head for approval and, if approved, payment or reimbursement will be processed through the teammate's department training budget.

V. Approval Procedures

- A. Teammates must first discuss their educational goals, degree plan, and the course(s) they want to take with their supervisor. The teammate's supervisor and the local Human Resources Manager will review the request to determine whether the proposed plan and related course(s): 1) is job-related; or 2) would provide preparation for broader assignments and promotion; or 3) would provide other job-related benefits to the company. Teammates must also submit a copy of the degree plan specifically outlining the courses necessary to complete the degree.
- B. Prior to the start of each class, teammates must submit an Educational Pre-Approval & Reimbursement Form (Addendum 1) and a signed Repayment Agreement (Addendum 2) to their local Human Resources for approval.
- C. The local Human Resources will submit the form and documentation to the Corporate Benefits Department for final approval. The Corporate Benefits Department will notify the local Human Resources in writing if the course(s) is approved or not approved.
- D. Teammates must notify the Human Resources of changes to their degree plan.

VI. Reimbursement Procedures

- A. Teammates must submit an Educational Pre-Approval & Reimbursement Form (Addendum 1) to their local Human Resources along with detailed receipts for tuition, books, and lab fees. Local Human Resources will submit the form and receipts to Corporate Benefits Department for review and payment. Reimbursement will be added to the teammate's paycheck.

VII. **Reimbursement Schedule**

- A. Upon approval of the course, teammates will be eligible for an initial payment equal to 30% of the total eligible costs.
- B. Additional reimbursement is dependent upon the teammate's final grade for the course. Teammates will be eligible for additional reimbursement based on the following schedule:
- | | |
|------------------------------------|-------------------------------|
| • Grade of A | Additional 70%, Total of 100% |
| • Grade of B | Additional 50%, Total of 80% |
| • Grade of C | Additional 20%, Total of 50% |
| • Grade of below C | Not Eligible |
| • Grade of Pass (Pass/Fail course) | Additional 70%, Total of 100% |
| • Grade of Fail (Pass/Fail course) | Not Eligible |
- C. Teammates who received the initial payment of 30% who: 1) do not earn a grade of "C" or above; 2) do not "Pass" the class; 3) do not complete the coursework; or 4) withdraw from a class, are required to repay the 30% initial partial payment as outlined in the Repayment Agreement.
- D. Teammates are not required to take the initial payment upon approval of the course. They may wait and receive the total payment once the course's final grade is issued.

VIII. **Teammates who Separate Employment**

Teammates who receive an Educational Assistance payment, then voluntarily or involuntarily separate from employment within **six (6)** months of receiving payment, are required to repay the payment as outlined in the Repayment Agreement.

IX. **College Accreditations**


- A. Accreditation is determined through an approved Department of Education Regional, Institutional, or Specialized accrediting agency under the Code of Federal Regulations Title 34 and listed in the Federal Register (65 FR 53277) of approved accrediting agencies. Link to the Federal Register is below:

[Federal Register Nationally Recognized Accrediting Agencies and State Approval Agencies](#)

Specific programs that are approved can be found on the Department of Education searchable website, found here:

[DAPIP | Homepage](#)

Addendum 1

	EDUCATIONAL PRE-APPROVAL & REIMBURSEMENT FORM	Date Submitted: _____
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For Pre-Approval and Advance Payment Request
(Complete Sections A and B Only)

For Reimbursement Request
(Complete Sections A and C Only)

SECTION A

TEAMMATE NAME			COURSE START DATE		COURSE END DATE	
EDUCATIONAL INSTITUTION			QUARTER/SEMESTER			
COURSE#	COURSE NAME	TUITION\$	BOOKS\$	LAB \$	TOTAL\$	FINAL GRADE
TOTALS						

SECTION B

SECTION C

Advance Approval Request: (before course(s) begin)

Teammate Printed Name: _____

Date: _____

Teammate Signature: _____

D Check here if you do not want to receive an advance
Payment of 30%.

Reimbursement Request: (after grade(s) received)

Teammate Signature: _____

Date: _____

You must submit eligible receipts for tuition, fees, and books and a copy of the final grade for each course to Human Resources department no later than 6 weeks after the course ends to determine qualification for final reimbursement. Failure to submit required documents in a timely manner might result in ineligibility for reimbursement.

Pre-Approval Received By:

Department Head: _____

Date: _____

HR Manager: _____

Date: _____

General Manager: _____

Date: _____

Reimbursement Request Approved By:

HR Manager: _____

Date: _____

Plan Year: _____

YTD Amount Paid: _____

YTD Remaining Amount Available: _____

EDUCATIONAL ASSISTANCE POLICY
Repayment Agreement

I, _____, understand and agree that my eligibility for financial assistance under the McLane Educational Assistance Policy ("Policy") is conditioned upon me being employed by McLane Company, Inc. or one of its subsidiaries through the completion of the course(s) and completing the course(s) for which I seek reimbursement.

I expressly understand and agree that in the event my employment with McLane ends within 6 months of receiving an Educational Assistance payment, whether voluntarily or involuntarily; I must reimburse McLane for any payment(s) during this time. I also understand that such monies may be withheld from my final wages, vacation, severance, bonus, or other monies owed to me by McLane at the time of my separation. Finally, I understand that I may be required to write a check or provide other form of acceptable payment to McLane if my final paycheck does not have enough money to cover the required reimbursement.

I expressly understand and agree that in the event that I: 1) do not earn a grade of "C" or above; 2) do not "pass" the class; 3) do not complete the coursework; or 4) withdraw from a class, I am required to repay the 30% partial payment I have received. I also understand that such monies may be withheld from the wages owed to me by McLane.

I expressly authorize McLane to deduct and/or withhold Payment(s) I owe McLane under the Policy as described above.

TEAMMATE SIGNATURE

DATE