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Detroit, MI 48226
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UAW-Ford Voluntary Employees' Beneficiary Association (VEBA) Trust Fund

Dear UAW-Ford Hourly Employee,

We are delighted to provide to you a Summary Plan Description for benefits provided to you by the UAW Ford VEBA Trust Fund ("VEBA"). This document contains valuable information about benefits that may be available to you through the UAW-Ford Joint Apprenticeship and Training Program, the UAW-Ford Tuition Assistance Program, and the UAW-Ford Employee Support Services Program.

Pursuant to federal law under the Employee Retirement Income Security Act ("ERISA"), amongst other information, this Summary Plan Description provides general information about the benefits, eligibility for the benefits, how to access the benefits and how to appeal if you feel you have been wrongfully denied the benefits. Please keep in mind not all employees are eligible for all benefits.

If after reading this document, you have further questions you may reach out to the UAW-Ford Voluntary Employee Benefits Trust at 313 392 7222, the address of which is 151 West Jefferson Ave., Detroit, MI, 48226. Thanks in advance for reading this important document.

Sincerely,

VEBA Board of Trustees

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THE UAW–FORD JOINT BENEFITS PROGRAMS PLAN

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INTRODUCTION

This booklet sets forth and describes certain benefits provided under the UAW–Ford Joint Benefits Programs Plan (“Plan”), an employee welfare benefit plan funded by the UAW–Ford Voluntary Employees’ Beneficiary Association Trust Fund (“Fund”) and which consists of the UAW–Ford Joint Apprenticeship and Training Program, the UAW–Ford Tuition Assistance Program, and the UAW–Ford Employee Support Services Program, adopted effective March 1, 2021. You may notice that certain words throughout this booklet (referred to as the “Summary” or “SPD”) are capitalized. This indicates that they have a special meaning and are defined in the front of the booklet. The purpose of the Plan is to provide certain welfare benefits to you and your eligible dependents under the Collective Bargaining Agreement between the UAW and Ford, as more fully described herein. The eligibility requirements are described throughout this booklet in the sections describing particular benefits. The benefits provided under the Plan are as follows:

The UAW–Ford Joint Apprenticeship and Training Program

- The UAW–Ford Joint Apprentice Program
- The Reskilling Program
- The Non-Apprentice Training Program

The UAW–Ford Tuition Assistance Program

- Education Training Assistance Program
- Survivor Education and Training Assistance Program
- National Vocational Retraining Assistance Program
- Retiree Tuition Assistance Program
- UAW–Ford Community Engagement Scholarship Program for Dependent Children

The UAW–Ford Employee Support Services Program

- The Wellbeing and Fitness Center Program

This booklet is organized to provide you with essential basic information about the Plan, its operations, and who to contact with questions and claims. It then covers how to file a claim and appeal any claim that is denied. After that, the booklet contains information about certain legal rights you may have and provides other general information about the administration of the Plan and your rights under certain laws. Descriptions of the benefits available to you and how to use those benefits are included in Articles V–VII of this booklet.

This document, together with the relevant provisions of the Trust Agreement, constitutes both the written plan and the summary plan description as required by section 102 of the Employee Retirement Income Security Act of 1974, as amended (“ERISA”) and U.S. Department of Labor Regulation section 2520.102-2 and 2520.102-3, 29 C.F.R. §§ 2520.102-2, 102-3. The provisions of the Collective Bargaining Agreement are incorporated by reference into this Plan document. If there is any conflict between this document and the Collective Bargaining Agreement, the Collective Bargaining Agreement will control. In addition, the Employer and the Union reserve the right to amend or end the Plan and Programs at any time, subject to the terms of the Collective Bargaining Agreement.

This booklet contains a summary in English of your Plan rights and benefits. If you have difficulty understanding any part of this booklet, or have any questions after reading this Summary, contact the Office of the Executive Directors, which can be reached at 313 392 7222, and the address of which is 151 West Jefferson Ave., Detroit, MI, 48226.

ARTICLE I DEFINITIONS

Section 1.1 Collective Bargaining Agreement

“Collective Bargaining Agreement” means any Collective Bargaining Agreement entered into between the Employer and the Union, including any renewals or amendments thereof providing for payments by the Employer to the UAW–Ford Voluntary Employees’ Beneficiary Association Trust Fund and including the Letter of Understanding Regarding Joint Programs dated October 29, 2019, and any renewals or amendments thereto, which are referred to hereafter collectively as the “Letter of Understanding.”

Section 1.2 Code

“Code” means the Internal Revenue Code of 1986, as amended from time to time, and regulations promulgated thereunder.

Section 1.3 Dependent

“Dependent” means an individual eligible for a particular benefit by virtue of their relationship to an Employee.

Section 1.4 Employee or Eligible Employee

“Employee” or “Eligible Employee” means any employee of the Employer, as hereafter defined, on whose behalf the Union acts as a collective bargaining agent and who is covered by a Collective Bargaining Agreement between the Union and the Employer, who satisfies any applicable eligibility criteria described in this Summary. Different benefits may have different eligibility requirements. “Employee” also means such salaried Ford employees who are specifically designated in Program descriptions as Eligible Employees.

Section 1.5 Employer

“Employer” means Ford Motor Company.

Section 1.6 ERISA

“ERISA” means the Employee Retirement Income Security Act of 1974, as amended, and any regulations promulgated thereunder.

Section 1.7 Executive Directors

“Executive Directors” means the two (2) individuals, one (1) appointed by the Employer and one (1) appointed by the Union, who may perform all managerial and administrative duties related to the Fund on behalf of the Trustees.

Section 1.8 Executive Program Directors

“Executive Program Directors” means the two (2) individuals, one (1) appointed by the Employer and one (1) appointed by the Union, who may perform all managerial and administrative duties related to a specific Program administered under the Plan on behalf of the Trustees.

Section 1.9 Named Fiduciary

“Named Fiduciary” means the Board of Trustees of the UAW-Ford Voluntary Employees’ Beneficiary Association Trust Fund.

Section 1.10 National Joint Apprenticeship Committee

“National Joint Apprenticeship Committee” means the Committee created by the Collective Bargaining Agreement, composed of an equal number of Employer representatives and Union representatives, charged with the administration and oversight of the UAW–Ford Joint Apprentice Program and related provisions of the Collective Bargaining Agreement.

Section 1.11 National Joint Program Representative

“National Joint Program Representative” means an individual assigned to provide support in the administration of benefits under the Plan, in accordance with a determination by the Trustees that such support is required.

Section 1.12 National Joint Skilled Trades Governance Team

“National Joint Skilled Trades Governance Team” means the group created by the Collective Bargaining Agreement, composed of an equal number of Employer representatives and Union representatives, charged with implementing provisions of the Collective Bargaining Agreement related to the skilled trades.

Section 1.13 Participant

“Participant” means any eligible Employee or Retiree, or the eligible dependent or spouse of an Employee or Retiree, who participates in any Program described in the Plan.

Section 1.14 Plan

“Plan” means the UAW–Ford Joint Benefits Programs Plan.

Section 1.15 Plan Administrator

“Plan Administrator” means the Board of Trustees of the UAW–Ford Voluntary Employees’ Beneficiary Association Trust Fund.

Section 1.16 Programs

“Programs” means the UAW–Ford Joint Apprenticeship and Training Program, the UAW–Ford Tuition Assistance Program, and the UAW–Ford Employee Support Services Program, each of which is described in the Plan.

Section 1.17 Retiree

“Retiree” means a former Employee who has separated from service with Ford Motor Company and (a) is eligible as of his or her date of separation for benefits under the UAW–Ford Retirement Plan or (b) at the time of his or her date of separation (i) is age fifty-five (55) or older with ten (10) or more years of service from such Employee’s Employer service date or (ii) has thirty (30) or more years of service from such Employee’s Employer service date.

Section 1.18 Seniority

Except as otherwise specified in this document, “Seniority” shall have the meaning provided in the Collective Bargaining Agreement between the Employer and the Union.

Section 1.19 Seniority Employee

“Seniority Employee” means an Employee who, per Article 8, Section 4 of the Collective Bargaining Agreement between the Employer and the Union, has completed three (3) months of continuous employment with the Employer.

Section 1.20 Spouse

“Spouse” means an individual lawfully married to an Employee or a Retiree in any state.

Section 1.21 Trust Fund or Fund

“Trust Fund” or “Fund” means the UAW–Ford Voluntary Employees’ Beneficiary Association Trust Fund.

Section 1.22 Trustees

“Trustees” means the Board of Trustees of the UAW–Ford Voluntary Employees’ Beneficiary Association Trust Fund.

Section 1.23 Union, UAW, or Local Union

“Union,” “UAW,” or “Local Union” means the International Union, United Automobile, Aerospace and Agricultural Implement Workers of America, AFL-CIO, and its affiliates.

ARTICLE II LEGAL INFORMATION

This information about the benefits offered through the Plan is provided in compliance with ERISA and the regulations promulgated thereunder. ERISA regulates the funding and administration of the Plan. You should not need these details on a regular basis; however, this information may be useful if you have specific questions about your benefits.

Section 2.1 Plan Name

There is a separate legal entity that provides the benefits described in this booklet. It is the UAW–Ford Joint Benefits Programs Plan.

Section 2.2 Plan Sponsor

The Plan Sponsor is the Board of Trustees. The Board of Trustees can be reached at the Office of the Executive Directors, 151 West Jefferson Ave., Detroit, MI 48226.

Section 2.3 Plan Administration and Named Fiduciary

The Board of Trustees of the UAW-Ford Voluntary Employees' Beneficiary Association Trust Fund administers the Fund and the Plan and serves as the Plan Administrator and Named Fiduciary for the Fund and Plan under ERISA with sole discretionary responsibility over the control and management of the operations of the Fund and the Plan. The Board of Trustees may delegate any of its managerial and administrative duties to a person or firm out of necessity or convenience, including the Executive Directors of the Fund.

Section 2.4 Agent for Service of Legal Process

Service of legal process may be made upon the Plan Administrator or any individual Trustee at this address: Office of the Executive Directors, 151 West Jefferson Ave., Detroit, MI 48226.

Section 2.5 Identification Number

The Employer Identification Numbers (“EIN”) assigned by the Internal Revenue Service to the VEBA Trust is 85-0748670.

Section 2.6 Plan Number

The Plan Number is 501. All your benefits are provided under this plan number.

Section 2.7 Plan Year

The Plan Year begins on January 1 and ends on December 31.

Section 2.8 Plan Records

Plan records are maintained on a Plan Year basis and are kept at 151 West Jefferson Ave., Detroit, MI 48226.

Section 2.9 Plan Funding

The benefits provided under the Plan are funded by Employer contributions pursuant to the Collective Bargaining Agreement between the Employer and the Union. All assets are held in trust by the Board of Trustees of the Fund. Benefits are paid or funded from the accumulated assets of the Fund.

Section 2.10 Collective Bargaining Agreement

The Plan is maintained in accordance with the Collective Bargaining Agreement between the Employer and the Union. Any Employee or Participant may, upon written request to the Executive Directors of the Fund, obtain a copy of the Collective Bargaining Agreement.

**ARTICLE III
OTHER INFORMATION**

Section 3.1 Plan Administration and Operation

The Plan is administered by the Board of Trustees of the Fund, which consists of both Union and Employer representatives. The Plan is financed through Employer contributions in accordance with the Collective Bargaining Agreement between the Employer and the Union, with assets held in the Fund in order to provide benefits to Participants and pay administrative expenses. The Fund's assets may be invested and its reserves monitored by the Board of Trustees.

Section 3.2 Authority of the Board of Trustees

- (a) The Board of Trustees (or its designee(s)) has the exclusive right, power, and authority, in its sole and absolute discretion, to administer, apply, and interpret the Plan and any other Plan documents and to decide all matters arising in connection with the operation or administration of the Plan. Among other things, the Board of Trustees (or its designee(s)) has the sole and absolute discretion to:
 - (i) Take all actions and make all decisions with respect to eligibility for benefits under the Plan;
 - (ii) Formulate, interpret, and apply rules, regulations, and policies necessary to administer the Plan in accordance with the Plan's terms;
 - (iii) Decide all questions, including legal or factual questions, relating to the nature and scope of benefits provided under the Plan;
 - (iv) Resolve and/or clarify any ambiguities, inconsistencies, and omissions arising under the Plan or other Plan documents; and
 - (v) Process, and approve or deny, benefit claims and rule on any benefit exclusions and determine the standard of proof required in any case.
- (b) The Board of Trustees may delegate any duties or powers, including the power to administer, apply, and interpret the Plan, as it deems necessary to carry out the administration of the Plan.
- (c) All determinations and interpretations made by the Board of Trustees or its designee(s) with respect to any matter arising under the Plan or any other Plan document will be final and binding on all individuals claiming benefits under the Plan.
- (d) The Board of Trustees may delegate to any Program's Executive Program Directors or, with respect to the UAW-Ford Joint Apprenticeship and Training Program, to the UAW-Ford National Joint Apprenticeship Committee or the UAW-Ford National Joint Skilled Trades Governance Team, any of its authority to manage or administer such Program, including any of the authority listed in this Section 3.2, and such Program's operations.
- (e) The Board of Trustees may employ or contract with any personnel, including consultants, attorneys, accountants, and National Joint Program Representatives, to help administer the Plan or any Program and to staff the operations of any Program. If the Board of Trustees, or the Executive Directors as the Board of Trustees' delegees, contracts with the Employer or the Union to provide any services to support the administration of the Plan or the operations of any Program, such contract shall not compensate the Employer or the Union other than to reimburse direct expenses and costs incurred by the Employer or the Union in the performance of the services provided under the contract.

Section 3.3 Plan Amendment

- (a) This Plan may be amended at any time, or from time to time, by a majority vote of the respective Employer Trustee and Union Trustee Groups, except that no amendment shall divert the Plan as then constituted, or any part thereof, to a purpose other than as set forth herein, nor shall there be any amendment as a result of which the Employer and Union Trustee Groups would not have equal power, or which will change the method of voting as set forth herein, or which will be in contravention of or inconsistent with the existing Collective

Bargaining Agreement between the parties hereto, nor shall there be any amendment which will, in any manner, contravene the terms and provisions of any applicable state or federal law.

- (b) With respect to any Program, the Executive Program Directors, or, with respect to the UAW–Ford Joint Apprenticeship and Training Program, the UAW–Ford National Joint Apprenticeship Committee or the UAW–Ford National Joint Skilled Trades Governance Team, shall recommend to the Board of Trustees any modifications to the Plan provisions addressing such Program specifically for the Board of Trustees’ consideration.

Section 3.4 Right of Appeal

- (a) If a dispute arises as to the administration of the benefits available from the Plan a Participant may request a review of the matter within sixty (60) days of becoming aware of the problem. A Participant requesting a review may have the opportunity to review pertinent documents. Requests for review must be made on an appeal form requested from the office of the Executive Directors of the involved Program or, if appropriate, the UAW Ford National Joint Apprenticeship Committee. Each Program may develop an appeal form appropriate to it, as approved by the Trustees or, where authorized, the Executive Directors or UAW Ford National Joint Apprenticeship Committee (“NJAC”).
 - (i) If the dispute concerns benefits available from the UAW–Ford Tuition Assistance Program or the UAW–Ford Employee Support Services Program, the Executive Directors of the Fund, in consultation with the Executive Program Directors of the Program that administers the benefit in question, will render an initial decision within sixty (60) days of receiving a request for review unless special circumstances require an extension of time, in which case a decision will be rendered within one hundred and twenty (120) days. The decision of the Executive Directors will be in writing and will include the specific reason(s) for the decision and specific references to provisions of the Plan documents upon which the decision is based.
 - (ii) If the dispute concerns benefits available from the UAW–Ford Joint Apprenticeship and Training Program, the National Joint Apprenticeship Committee or the National Joint Skilled Trades Governance Team, or such body as either the NJAC or the National Joint Skilled Trades Governance Team designates, , as appropriate, will render an initial decision within sixty (60) days of receiving a request for review unless special circumstances require an extension of time, in which case a decision will be rendered within one hundred and twenty (120) days. The decision of the National Joint Apprenticeship Committee or the National Joint Skilled Trades Governance Team will be in writing and will include the specific reason(s) for the decision and specific references to provisions of the Plan documents upon which the decision is based.
- (b) A Participant may appeal the determination of the Executive Directors, the National Joint Apprenticeship Committee, or the National Joint Skilled Trades Governance Team to the Board of Trustees within sixty (60) days of receiving the decision. Requests must be made on an appeal form requested from the Office of the Executive Directors. The Trustees (or their designee) will render a final decision within sixty (60) days of receiving a request for review unless special circumstances require an extension of time, in which case a decision will be rendered within one hundred and twenty (120) days. The decision of the Board of Trustees (or their designee) will be in writing and will include the specific reasons(s) for the decision and specific references to provisions of the Plan documents upon which the decision is based.
- (c) This Section applies to all disputes arising as to the administration of the benefits available from the Plan under any section of this Plan Document, regardless of whether the specific provision of the Plan Document at issue references this Section.

Section 3.5 Equal Opportunity Pledge

The Plan provides all benefits to eligible Participants free of discrimination based upon one’s race, color, national origin, age, sex (including pregnancy), sexual orientation, gender identity or expression, transgender status, union activity, religion, disability, veteran status, arrest record, or marital status.

ARTICLE IV ERISA RIGHTS

As a Participant in the Plan, you are entitled to certain rights and protections under ERISA. This Article sets forth those rights and protections.

Section 4.1 Information About Your Plan and Benefits

ERISA provides that all Participants shall be entitled to receive information about their plan and benefits, including the rights to:

- (a) Examine, without charge, at the Office of the Executive Directors or other specified locations such as work sites and union halls, all Plan documents governing the Plan, including insurance contracts and collective bargaining agreements, and a copy of the latest annual report (Form 5500 Series) filed by the Plan with the U.S. Department of Labor and available online or at the Public Disclosure Room of the Employee Benefits Security Administration;
- (b) Obtain, upon written request to the Plan Administrator, copies of documents governing the operation of the Plan, including insurance contracts and collective bargaining agreements, and copies of the latest annual report (Form 5500 Series) and updated Consolidated Plan Document and Summary Plan Description. The Plan Administrator may make a reasonable charge for the copies; and
- (c) Receive a summary of the Plan's annual financial report. The Plan Administrator is required by law to furnish each Participant with a copy of this summary annual report.

Section 4.2 Duties of Plan Fiduciaries

In addition to creating rights for Participants, ERISA imposes duties upon the people who are responsible for the operation of the Plan. The people who operate the Plan, called "fiduciaries," have a duty to do so prudently and in the interest of you and other Participants and beneficiaries. No one, including your Employer, your Union, or any other person, may fire you or otherwise discriminate against you in any way to prevent you from obtaining a welfare benefit or exercising your rights under ERISA.

Section 4.3 Enforcing Your Rights

- (a) If your claim for a benefit is denied or ignored, in whole or in part, you have a right to know why this was done, to obtain copies of documents relating to the decision without charge, and to appeal any denials, all within certain time schedules.
- (b) Under ERISA, there are steps you can take to enforce the above rights. For instance, if you request materials from the Plan and do not receive them within thirty (30) days, you may file suit in a federal court. In such a case, the court may require the Plan Administrator to provide the materials and pay you up to \$110 a day until you receive the materials, unless the materials were not sent for reasons beyond the control of the Plan Administrator.
- (c) If you have a claim for benefits that is denied or ignored, in whole or in part, you may file suit in state or federal court. In addition, if you disagree with the Plan's decision, you may file suit in federal court. If it should happen that Plan fiduciaries misuse the Plan's money, or if you are discriminated against for asserting your rights, you may seek assistance from the U.S. Department of Labor, or you may file suit in a federal court. The court will decide who should pay court costs and legal fees. If you are successful, the court may order the person you have sued to pay these costs and fees. If you lose, the court may order you to pay these costs and fees; for example, if it finds your claims frivolous.

Section 4.4 Assistance with Your Questions

If you have any questions about the Plan or your benefits, you should contact the Plan Administrator. If you have any questions about this statement or your rights under ERISA, or if you need assistance in obtaining documents from the Plan Administrator, you should contact the nearest office of the Employee Benefits Security Administration, U.S. Department of Labor, listed in your telephone directory or the Division of Technical Assistance and Inquiries, Employee Benefits

Security Administration, U.S. Department of Labor, 200 Constitution Avenue N.W., Washington, D.C. 20210. You may also obtain certain publications about your rights and responsibilities under ERISA by calling the publications hotline of the Employee Benefits Security Administration.

ARTICLE V THE UAW–FORD JOINT APPRENTICESHIP AND TRAINING PROGRAM

Section 5.1 General Program Description

The UAW–Ford Joint Apprenticeship and Training Program (the “Program”) provides opportunities for Employees to enter the skilled trades as certified UAW–Ford Journeypersons, to maintain and enhance their skills, and to learn to utilize new technologies and techniques emerging in the skilled trades at the Employer’s facilities. It administers and oversees:

- (a) The UAW–Ford Technical Training Center;
- (b) The UAW–Ford Joint Apprentice Program;
- (c) The Reskilling Program; and
- (d) The Non-Apprentice Training Program.

Section 5.2 The UAW–Ford Technical Training Center

- (a) The UAW–Ford Technical Training Center (the “TTC”) is a fully utilized learning and training facility, comparable to a large vocational college, that provides high-quality classroom and hands-on training for Apprentices and Journeypersons. It delivers highly skilled graduating Apprentices and refreshes Journeypersons’ skills. The TTC strives to implement and offer training on relevant, current, and emerging technologies to support the Employer’s North America manufacturing facilities.
- (b) The TTC offers classroom instruction that counts towards the Apprentice Program Completion Requirements; conducts the three-week Core Skills Training Program for new Apprentices in the Apprentice Program; provides customized, hands-on training for Journeypersons who are developing their skills in the consolidated trades; facilitates training and coursework for Employees in the Reskilling Program and the Non-Apprentice Training Program; and completes assessments for the Apprentice Program and Reskilling Program.
- (c) The UAW–Ford Joint Apprenticeship and Training Program supplies high-quality instruction in the use of cutting-edge technologies and equipment to the TTC for the benefit of Employees enrolled in the UAW–Ford Joint Apprentice Program, the Reskilling Program, and the Non-Apprentice Training Program.
- (d) Expenses for travel, lodging, and wages of Employees who attend trainings at the TTC are the responsibility of each Employee’s home facility. Employees may submit a Travel Expense Report for reimbursement of mileage and per diem expenses. Transportation between lodgings and the TTC is the responsibility of the Employee. Meals are not provided.

Section 5.3 The UAW–Ford Joint Apprentice Program

(a) Overview

- (i) The UAW–Ford Joint Apprentice Program (the “Apprentice Program”), administered by the National Joint Apprenticeship Committee (“NJAC”), prepares Employees to become certified skilled tradespersons. The Apprentice Program provides a pathway for Employees to become Journeypersons in the following skilled trades:
 - (A) Industrial Electricity;
 - (B) Industrial Truck Mechanic;
 - (C) Machine Repair;
 - (D) Metal Model Making;

- (E) Millwright;
- (F) Plumbing-Pipefitting;
- (G) Toolmaking;
- (H) Tool and Die Making; and
- (I) Welding.

(b) Eligibility

- (i) To the extent consistent with the Apprentice Standards, all hourly Employees, including temporary employees who have been on the active employment rolls for ninety (90) days or more since their most recent hire or rehire date, and salaried Employees, who are at least eighteen (18) years of age and satisfy the physical requirements of the Employer for the trade they wish to enter are eligible to apply to join the Apprentice Program.

(c) Apprentice Program Selection Process

- (i) Employees who meet the eligibility requirements in Section 5.3(b) and who satisfactorily complete the Industrial Readiness Certificate Program (“IRCP”) may join their facility’s Apprentice Eligibility List upon NJAC approval.

(ii) Industrial Readiness Certificate Program

- (A) The IRCP is a prerequisite for Employees to earn a position on their facility’s Apprentice Eligibility List. The program consists of three standardized, non-accredited courses that Employees must successfully complete at an approved local college, university, or community college or through an approved online provider. The required courses are:

- (1) IRCP1: Mathematics–Shop Arithmetic;
- (2) IRCP2: Drafting–Machine Tool Blueprint Reading; and
- (3) IRCP3: Trade Related Preparation

- (B) All hourly Employees, including Temporary Employees who have been on the active employment rolls for ninety (90) days or more since their most recent hire or rehire date, and salaried Employees are eligible to enroll in IRCP courses.

- (C) Successful completion of IRCP courses is assessed on a pass/fail basis. A grade of 75% or higher (or equivalent) is considered passing.

- (D) Hourly employees may use the benefits available to them through the UAW–Ford Tuition Assistance Program to pay for tuition, fees, and books for IRCP courses.

- (iii) After successfully completing the IRCP, Employees must submit a transcript from the educational institution(s) at which they completed the courses to their Local Joint Apprenticeship Committee (“LJAC”) Representative for review and processing. At this time, Employees will complete and sign the Skilled Trades Preference Selection Form, indicating their preference for indenture in three skilled trades available at their facility.

- (iv) The LJAC Representative will forward Employees’ transcript(s), Skilled Trades Preference Selection Form, and contact information to the NJAC for review and approval. The acceptance or rejection of applications for the Apprentice Program will be at the sole discretion of the NJAC.

- (v) After approving applications for the Apprentice Program, the NJAC will notify Employees directly that they are being added to their facility’s current year Apprentice Eligibility List based on seniority and consistent with the process set forth in the Collective Bargaining Agreement:

- (A) Annual windows to join the current year's Apprentice Eligibility List open on January 1 and close at the end of business on December 31.
 - (B) Once the NJAC approves an Employee's application to join the Apprentice Program, the Employee will be placed on their facility's Apprentice Eligibility List, in seniority order, for the specific window year in which their application was approved.
 - (C) When an Employee completes the IRCP at the end of a window year, the required documents must be submitted to the NJAC no later than January 31 of the following year for the Employee to be eligible for placement on the window year's Apprentice Eligibility List.
- (vi) When Apprenticeship opportunities arise at a facility, the order of surveying for candidates will start with Employees on the earliest established annual Apprentice Eligibility List. If additional openings remain after the earliest established annual Apprentice Eligibility List has been exhausted, selection will proceed to the next earliest established annual Apprentice Eligibility List, and so on until the current open apprentice requisitions are filled.
- (A) In the event that a facility does not have sufficient candidates on its Apprentice Eligibility Lists to fill open apprentice requisitions, the local parties will contact the NJAC for resolution.
 - (B) Facilities that do not have a local Apprentice Program may allow Employees to join the Apprentice Eligibility List at another facility approved by the NJAC.
 - (C) Employees on the Apprentice Eligibility List may submit a request to the LJAC that they be bypassed. Upon approval of the request, such Employees will remain on the Apprentice Eligibility List in their original position until they request and receive approval from the LJAC to rescind the bypass. Upon approval to rescind the bypass, such Employees will be considered for the next available Apprenticeship opening for which they would have been eligible absent the bypass, taking into account trade preferences and position on the Apprentice Eligibility List.
- (vii) An Employee who is offered an Apprenticeship must sign an Apprenticeship Acceptance Form and an Apprenticeship Agreement, pursuant to the Apprenticeship Standards. The Employee is considered an Apprentice as of the "on course date" on the Apprenticeship Agreement, which will be the date of the Employee's in-plant Apprentice Orientation.
- (viii) Transfers
- (A) Employees who (1) are on their facility's Apprentice Eligibility List and are transferring their basic unit in-zone, taking a basic relocation allowance, or have completed the Modified Enhanced Relocation process; (2) were apprentices at their previous facility and were subject to a reduction in force in their previous apprentice classification; or (3) are apprentices at their present facility and elect to "return home" under the Collective Bargaining Agreement's provision for Return to Basic Unit have the option of transferring their Apprentice Eligibility List placement to the new unit. The Employee should make a request to the NJAC to transfer Apprentice Eligibility List locations. Once the NJAC approves the request, the Employee's name will be added to the new facility's Apprentice Eligibility List in seniority order in the current year.
 - (B) The NJAC will determine the trade or trades for which the transferring Employee is eligible at their new facility, examining such factors as forecasted trade requirements and the availability of NJAC-approved Apprenticeships in those trades at that facility. For Employees who were Apprentices at their previous facility, if the previous trade in which the Employee was indentured is not available at the present facility, the Employee may be given three other trade preferences.

(ix) Temporary Employees

- (A) A temporary Employee who is assigned to multiple plants will follow the processes outlined in Section 5.3(c)(v) and (vi).
- (B) Temporary Employees who were laid off for a period of time exceeding the amount of time during which they were on the active rolls since their most recent hire or rehire (“time for time”) will be removed from their facility’s Apprentice Eligibility List. Upon rehire, and after ninety (90) days have passed since their most recent rehire date, Temporary Employees may resubmit their original IRCP transcript(s) and Skilled Trades Preference Selection Form at their rehired facility and follow the process outlined in Section 5.3(c)(v) to be placed on the rehired facility’s Apprentice Eligibility List.

(d) Program Completion Requirements

(i) To graduate from the Apprentice Program, Apprentices must complete (1) Apprentice Orientation and basic Safety Training; (2) the Core Skills Training Program; (3) Shop Hours; (4) Tasks; (5) Related Training Instruction; (6) In-Course Assessments; (7) Classification Based Enhanced Training; and (8) a Graduation Assessment and Mentoring Class.

(ii) Apprentices’ completion percentages of Shop Hours, Tasks, and Related Training Instruction must remain within five percent (5%) of each other at all times during the Apprentice Program.

(iii) Apprentice Orientation and Basic Safety Training

- (A) New Apprentices will complete Apprentice Orientation, and basic Safety Training of at least forty (40) hours, to be provided by the LJAC Representatives at their facilities.
- (B) The required Safety Training must be completed before an Apprentice attends the Core Skills Training Program.

(iv) Core Skills Training Program

- (A) After completing Apprentice Orientation and Safety Training, Apprentices will attend a Core Skills Training Program at the TTC.
- (B) The Core Skills Training Program is a three-week comprehensive introduction to the skilled trades that provides training in generic skills, such as measurement and communication, and core skills related to specific trades. It is designed to provide new Apprentices with intensive instruction in fundamental, hands-on shop techniques including safety awareness, communication skills, performance-based training, and group skills enhancement. The program serves as a foundation or building block for future skills Apprentices will acquire throughout the Apprentice Program and is designed to accelerate the learning and performance of basic trade skills on the job.
- (C) The Core Skills Training Program begins on a Monday and continues for three consecutive weeks. The NJAC establishes a schedule for the Core Skills Training Program yearly. The course is conducted at the TTC.
 - (1) Each Apprentice’s LJAC Representative will register them for the Core Skills Training Program at least three weeks before the first day of the program.
 - (2) Expenses for travel, lodging, and wages of Apprentices who attend the Core Skills Training Program are the responsibility of each Apprentice’s home facility. Apprentices may submit a Travel Expense Report for reimbursement of mileage and per diem expenses.
 - (3) Lodging at an area hotel will be provided for Apprentices traveling to the TTC from outside of Michigan. Hotel reservations will be made by the Human Resources

Department at each Apprentice's facility. Apprentices are responsible for transportation between the hotel and the TTC. Meals are not provided.

- (D) Each Apprentice must complete the Core Skills Training Program as soon as possible after beginning their Apprenticeship, ideally within two weeks of their on-course date.
 - (E) Three original copies of the Apprentice's Apprenticeship Agreement and one Supplemental Data Form must be sent to the NJAC one week before the incoming Apprentice is scheduled to enter the Core Skills Training Program. Failure to submit the forms by this date may result in rescheduling of the Core Skills Training Program.
 - (F) Attendance and punctuality at all sessions of the Core Skills Training Program is mandatory.
 - (1) An Apprentice who misses the first day of the program will be required to reschedule.
 - (2) Other absences may be penalized on the following schedule:
 - (I) One absence during the program with no documentation: the NJAC will determine an appropriate remedy.
 - (II) Two absences during the program with no documentation: the Apprentice will be suspended until the next available Core Skills Training Program session.
 - (III) Three absences during the program with no documentation: the Apprentice may be suspended or removed from the Apprentice Program, at the discretion of the NJAC.
 - (3) Tardiness, including returns from breaks and lunch, may also be penalized. The Core Skills Training Instructor will determine the appropriate remedy for a first occurrence of tardiness. A second offense may result in probation, at the discretion of the NJAC.
- (v) Shop Hours
- (A) Each Apprentice must complete a minimum of 8,000 Shop Hours in specific training areas and rotational assignments at the Apprentice's facility, designed to allow the Apprentice to meet Task Performance Standards.
 - (1) During the first 500 Shop Hours, each Apprentice must successfully complete all modules in the Apprentice Safety Program and the Safety Tasks contained in the Basic Training Guide.
 - (2) Each Apprentice's total Shop Hours must include twenty-four (24) hours of safety-related training during the Core Skills Training Program and at least twenty-four (24) hours of trade-specific safety training throughout the balance of their Apprenticeship. Safety training may occur at the Apprentice's home facility.
 - (B) An Apprentice may, with the approval of the NJAC, be allowed Shop Hour credit for previous work experience gained in an apprenticeship program or a trainee, upgrader, or changeover program.
 - (1) Requests for Shop Hour credit must be initiated prior to the submission of the Apprentice's Apprenticeship Agreement.
 - (2) An Apprentice seeking credit for previous work experience must have their former employer send a letter on company letterhead to the LJAC within ninety (90) days of their request for Shop Hour credit that includes the following information:
 - (I) Dates of the Apprentice's service;

- (II) Types of work performed by the Apprentice;
 - (III) Hours, days, or weeks the Apprentice worked on each type of work; and
 - (IV) Notarized signature of a company official.
- (3) After reviewing the Apprentice's request for Shop Hour credit, the LJAC Representative will submit a report to the NJAC that includes a recommendation for the Shop Hour credit that should be awarded to the Apprentice and any relevant documentation.
 - (4) The NJAC will determine the amount of Shop Hour credit, if any, to be awarded to the Apprentice. The Shop Hour requirement in the Apprentice's Apprenticeship Agreement will be adjusted accordingly.
 - (5) Apprentices may not receive credit for previous work experience gained at a trade school or vocational school.

(vi) Tasks

- (A) Each Apprentice will be assigned to an experienced Journeyman in their trade to learn the Tasks of the trade. The Journeyman, working with a salaried supervisor of the Employer, will certify that the Apprentice demonstrates skill competencies and follows safe work practices while performing each Task.
- (B) In the course of the Apprentice Program, each Apprentice must successfully perform 100% of the required Tasks defined in the NJAC's Training Guides for the Apprentice's trade, under the supervision of a Journeyman and a salaried supervisor of the Employer, as follows:
 - (1) Industrial Electricity:
 - (I) Layout, Construction, and Installation
 - (II) General Maintenance and Repair
 - (III) Power Construction, Sub-Station Maintenance, and Operation
 - (IV) Electronic Equipment Troubleshooting, Maintenance, and Repair, including:
 - Programmable Logic Controllers
 - Solid State Controls
 - Robotic Equipment
 - (2) Industrial Truck Mechanic:
 - (I) Chassis Maintenance
 - (II) Transmission and Clutches
 - (III) Gas and Diesel Engines and Electric Motor Repair and Maintenance
 - (IV) Electrical, Cooling, and Hydraulic Systems Maintenance and Repair
 - (V) Battery, Wheel, and Tire Maintenance
 - (3) Machine Repair:
 - (I) Lathe
 - (II) Standard and Specialty Milling Machines
 - (III) Grinders:
 - I.D., O.D., and Surface CNC Machines
 - EDM, CMM, and Laser Cutting Machines

- (4) Metal Model Making:
 - (I) Metal Forming/Bench Layout and Press Area
 - (II) Body in White Assembly
 - (III) Body Side Assembly
 - (IV) Underbody Assembly
 - (V) Hemming/Closing and Metal Finishing
 - (VI) Prototype Fixture Building
 - (VII) Body Finalizing
 - (VIII) Body Structure Concepts
 - (IX) Tools and Machine Awareness
 - (X) Tool Room
 - (XI) Inspection Awareness
 - (XII) Basic Welding Exposure
- (5) Millwright:
 - (I) Troubleshoot, Maintain, Remove, and Replace Machinery and Equipment
 - (II) Layout, Fabricate, and Install Structural Equipment and Machinery
 - (III) Cranes, Elevators, Speed Reducers, and Variable Speed Drives
- (6) Plumbing-Pipefitting:
 - (I) Layout, Construction, and Installation
 - (II) Steamfitting and Pipefitting Maintenance
 - (III) Plumbing Installation and Maintenance
 - (IV) Troubleshoot and Repair Valves and Pneumatic Equipment
- (7) Toolmaking:
 - (I) Lathe
 - (II) Standard and Specialty Milling Machines
 - (III) Grinders
 - I.D., O.D., and Surface CNC Machines
 - EDM, CMM, and Laser Cutting Machines
 - (IV) Bench Work
 - (V) Floor Maintenance
- (8) Tool and Die Making:
 - (I) Lathe
 - (II) Standard and Specialty Milling Machines
 - (III) Grinders
 - I.D., O.D., and Surface CNC Machines
 - EDM, CMM, and Laser Cutting Machines
 - (IV) Bench Work
 - (V) Floor Maintenance
 - (VI) Die Tryout

- (9) Welding:
 - (I) Machinery and Equipment
 - (II) Construction and Fabrication
 - (III) Pipe Welding
 - (IV) Tool and Die Welding
- (C) The Apprentice’s assigned Journeyperson, working with a salaried supervisor of the Employer, will verify the Apprentice’s ability to perform the Tasks defined in the Training Guides and will also evaluate the Apprentice’s performance in areas including:
 - (I) Technical Knowledge;
 - (II) Independence;
 - (III) Dependability;
 - (IV) Judgment;
 - (V) Workmanship;
 - (VI) Motivation; and
 - (VII) Cooperation
- (D) In addition to the required Tasks defined in the NJAC’s Task Books for the Apprentice’s trade, each Apprentice must successfully perform 100% of the plant-specific Tasks for their facility, as determined by the LJAC and approved by the NJAC.
- (E) Apprentices who have demonstrated the ability to perform all Tasks defined in the Task Books and all plant-specific Tasks may be rotated through other shop phases of their trade to gain proficiency or learn new tasks introduced by technological change.
- (F) Apprentices must consistently achieve satisfactory evaluations and on-the-job Task completion to complete the Apprentice Program.
- (G) It is the responsibility of the Apprentice to inform their Journeyperson and Process Coach of the Tasks they must complete, to ask for Task sign-off when the required level of proficiency is achieved, to inform the LJAC Representative of their progress or difficulties with Performance Based Training, and to participate in 90-Day/500-Hour Audits with the LJAC Representative.

(vii) Related Training Instruction

- (A) Each Apprentice must successfully complete at least 576 hours of Related Training Instruction (“RTI”) at an approved local educational institution or through an approved online provider. Apprentices must complete at least the percent of total required RTI hours for each shop hour period as indicated below:

Shop Hour Periods	Percent of Total Classroom Hours
0–1000	13% (75 hours)
1001–2000	27% (156 hours)
2001–3000	40% (230 hours)
3001–4000	54% (311 hours)
4001–5000	67% (386 hours)
5001–6000	81% (467 hours)
6001–7000	94% (541 hours)
7001–graduation	100% (576 hours)

- (B) The LJAC Representative at each Apprentice's facility will develop a schedule of required RTI classes for each Apprentice based on the NJAC's Related Training Instruction Guide, which sets out a standard RTI curriculum, and the facility's approved curriculum for the facility's trades which have Apprenticeship positions. Elective RTI courses must be approved by the NJAC.
- (C) The LJAC at each Apprentice's facility will enroll Apprentices in RTI classes at an approved local provider or through an approved online provider.
- (D) No changes in class curriculum or schedules are allowed without prior written approval of the LJAC. Apprentices may not withdraw from a course without the approval of the LJAC.
- (E) Apprentices may use benefits available through the UAW–Ford Tuition Assistance Program for registration fees, tuition, and books required in connection with Related Training Instruction and for examination fees for the successful completion of tests taken for related classroom credit. To the extent tuition, fees, and/or books are related to, and requirements of, the Apprentice Program, active Apprentices will have no maximum Tuition Assistance Program benefit limits.
- (F) Apprentices must enroll in and attend classes every term during the course of their Apprenticeship as long as any course or classroom hours requirements remain unfulfilled, unless given permission by the NJAC not to enroll in classes for a given term. Apprentices must attend at least 80% of class contact hours; anything less will be considered a course failure. If any Apprentice fails to fulfill their obligation as to school attendance, the NJAC may suspend the Apprentice, place the Apprentice on probation, or revoke the Apprentice's Apprenticeship Agreement. The Employer will carry out the Committee's decision and the Union will be notified of any such suspension or revocation.
- (G) Educational institutions enrolling Apprentices in RTI classes must provide official transcript(s) of approved credit and number of hours granted to the Apprentice. The Apprentice is responsible for providing official transcript(s) to the LJAC.
- (H) Any failed RTI classes must be repeated in the term immediately following the failure. Failures constitute grounds for counseling, probation, suspension, or removal from the Apprentice Program, as detailed in Section 5.3(h)(ii).
- (I) Credit for Previously Completed Coursework
 - (1) In certain cases, with the approval of the NJAC, classes taken by Employees before joining the Apprentice Program can be applied towards the RTI requirement.
 - (2) Apprentices seeking to receive credit for previously completed coursework should submit a transcript for the course(s) to the LJAC Representative. The LJAC Representative will submit the transcript and a recommendation for appropriate credit to the NJAC, which will approve or reject the recommendation, in its discretion.
 - (3) Employees who are on their facility's Apprentice Eligibility List may complete RTI classes before being accepted to the Apprentice Program and, upon joining the Apprentice Program, may request RTI credit for courses already completed.
- (J) RTI Hours do not count towards an Apprentice's 8,000 Shop Hours.
- (K) Apprentices who are laid off from the Apprentice Program will be allowed to complete RTI classes in which they are enrolled at the time of layoff and will be paid a training incentive, described in Article 9 of the Skilled Trades Agreements in the Collective Bargaining Agreement between the Employer and the Union, upon successful completion of courses during that term. While Apprentices are encouraged to complete courses in which they are enrolled at the time of layoff, they are not required to attend classes and will not prejudice

their status in the Apprentice Program by failing to complete the remainder of the term. Apprentices who are laid off from the Apprentice Program and of their own volition enroll in additional RTI courses will be reimbursed for tuition costs (by the Program) and training incentives (by the Employer) for the successful completion of such courses when they are reinstated or rehired into the Apprentice Program.

(viii) The NJAC may serve in an advisory role with respect to requests for deviations from the total number of Shop Hours or Related Training Instruction Hours for any Apprenticeship. Final decisions about deviations will be made by the NJAC.

(ix) In-Course Assessments

(A) 90-Day/500-Hour Audits

- (1) The LJAC at each Apprentice's facility will conduct 90-Day/500-Hour Audits to monitor Apprentice progress on a regular basis throughout the Program. The first audit should take place after the Apprentice has completed 90 days or 500 hours of the Apprentice Program. Subsequent audits should take place at similar appropriate intervals.
- (2) During a 90-Day/500-Hour Audit, the LJAC Representative will review completed Tasks, Shop Hours, RTI, and shop performance with the Apprentice; establish a schedule of training rotations consistent with the Apprentice's progress; seek out alternative training, if necessary, for task completion; and recommend an appropriate course of action to the NJAC if the Apprentice is deficient in any area.
- (3) The Apprentice should notify the LJAC Representative: (1) that a 90-Day/500-Hour Audit is due eighty (80) hours prior to the audit date; (2) if there is a need to rotate to a new area for additional training opportunities; and (3) when 100% of the required Tasks have been successfully completed.

(B) In-Course Progress Assessments

- (1) The TTC will administer an In-Course Progress Assessment ("ICPA") for all Apprentices at the mid-point of their Apprenticeship, after the Apprentice has completed 3,000 to 5,000 Shop Hours.
- (2) The ICPA is a one-day hands-on skills assessment of Tasks the Apprentice has successfully performed. The results of the ICPA allow the Apprentice Program to evaluate and, where necessary, modify the individual Apprentice's progress, the facility's Apprentice Program, and the overall Apprentice Program.
- (3) Apprentices who miss the ICPA will have the assessment rescheduled and may be put on probation or removed from the Apprentice Program, at the discretion of the NJAC. Apprentices who are tardy for any part of the ICPA, including returns from breaks or lunch, may be put on probation, at the discretion of the NJAC.
- (4) ICPAs are scored at the TTC. The results are sent first to the NJAC for review and approval and then to the LJAC Representative for review with the Apprentice.
- (5) If an Apprentice fails an ICPA, the Apprentice is placed on probation and the NJAC will work with the LJAC to develop a ninety-day Corrective Action Plan for the Apprentice in accord with the Apprentice Program's Assessment Deficiencies Policy. At the conclusion of the ninety-day period, the Apprentice will return to the TTC for a second ICPA focusing primarily on the Tasks failed in the first ICPA. Failure of the second ICPA will result in the Apprentice being removed from the Apprentice Program.

- (x) Classification Based Enhanced Training
 - (A) Apprentices will return to the TTC at least twice during their Apprenticeship to complete mandatory Classification Based Enhanced Training Courses specific to their trade.
 - (B) Enhanced Training Courses will be developed by the NJAC and designated as required for Apprentices at appropriate intervals during their Apprenticeship.
- (xi) Program Completion
 - (A) Graduation Assessment
 - (1) When an Apprentice successfully completes all other Program Completion Requirements, the TTC will administer a final Graduation Assessment, which will consist of hands-on assessments chosen at random from all Tasks the Apprentice has completed in the course of the Apprentice Program.
 - (2) Apprentices who miss any day of their Graduation Assessment will have the session rescheduled and may be put on probation or removed from the Apprentice Program, at the discretion of the NJAC. Apprentices who are tardy for any part of the Graduation Assessment, including returns from breaks or lunch, may be put on probation, at the discretion of the NJAC.
 - (3) Graduation Assessments conducted at the TTC are scored at the TTC. The results are sent first to the NJAC for review and approval and then to the LJAC Representative for review with the Apprentice.
 - (4) If an Apprentice fails a Graduation Assessment, the Apprentice is placed on probation and the NJAC will work with the LJAC to develop a sixty-day Corrective Action Plan for the Apprentice in accord with the Apprentice Program's Assessment Deficiencies Policy. At the conclusion of the sixty-day period, the Apprentice will return to the TTC for a second Graduation Assessment focusing primarily on the Tasks failed in the first Graduation Assessment. Failure of the second Graduation Assessment will result in the Apprentice being removed from the Apprentice Program.
 - (B) Mentoring Class
 - (1) In addition to the Graduation Assessment, Apprentices must complete a one-day Mentoring Class at the TTC, which is designed to ease the transition from Apprentice to Journeyman and to prepare Apprentices to take on the inherent mentoring responsibilities that accompany Journeyman status.
 - (2) The Mentoring Class will be scheduled at the same time as the Graduation Assessment.
 - (C) When an Apprentice successfully completes the Graduation Assessment and Mentoring Class, he or she will be issued a Certificate of Completion. The Apprentice Program will notify the Apprentice's facility that the Apprentice has qualified for Journeyman status and the facility will adjust the Apprentice's compensation accordingly. A graduated Apprentice may apply for a Union Journeyman card through the UAW Skilled Trades Department.
- (e) Toolboxes and Tool Sets
 - (i) Each Apprentice will receive a standard, classification specific toolbox and base tool set, provided by the Employer, within the first two weeks following the completion of Core Skills Training.
 - (ii) Standard apprentice tool sets may not contain certain application or plant-specific tool sets required by the skilled trades based on local operations. It is the responsibility of each facility to supplement Apprentices' base tool sets.

- (iii) The toolbox and tool set will become the property of the Apprentice upon graduation from the Apprentice Program.
- (iv) The toolbox and tool set will be subject to return if the Apprentice leaves the Apprentice Program without graduating.

(f) Apprentice Probationary Period

- (i) The first three (3) months of active employment for any Employee while classified as an Apprentice will be known as the Apprentice Probationary Period. During this period, the Apprenticeship Agreement may be cancelled by the National Joint Apprenticeship Committee.
- (ii) A temporary Employee who is indentured as an Apprentice will be regarded as a probationary Apprentice and will establish Apprentice seniority after the first three (3) months of continuous employment with the Employer as an Apprentice.
- (iii) Nothing in this Section will limit the right of the Employer to discipline a probationary Apprentice for cause for matters not related to the Apprentice's training, in accordance with the Collective Bargaining Agreement.

(g) Leaves of Absence

- (i) Apprentices may request a leave of absence for medical or personal reasons by submitting a letter to the LJAC. The request will be investigated and sent to the NJAC for approval.
- (ii) A leave of absence is defined as taking more than one week of time off from the Apprentice Program.
- (iii) Apprentices who are granted a leave of absence maintain their original seniority date in the Apprentice Program while on leave and seniority will accumulate throughout the leave period. However, Shop Hours will not be credited for time during leave from the Apprentice Program.
- (iv) Before reinstatement to the Apprenticeship following a leave, Apprentices must submit a letter to the LJAC stating their desired return date, which will be referred to the NJAC. Following approval from the NJAC, Apprentices will be fully reinstated with their seniority status in the trade in which they were indentured before the leave.
- (v) Apprentices elected to a Union position, or selected by the Union to do work, which takes the Apprentice away from the Apprentice Program may not continue their Apprenticeship. Such Apprentices must take a Union Leave of Absence or forfeit their Apprenticeship. Upon return from Union Leave, the Apprentice will be fully reinstated with his or her seniority status in the trade in which he or she was indentured before the leave. Apprentice seniority will accumulate throughout the leave period.

(h) Discipline

(i) Discipline for Unsatisfactory Shop Progress, School Progress, or Work

- (A) Counseling of an Apprentice by the LJAC will be the first disciplinary measure taken to address the Apprentice's unsatisfactory shop progress, unsatisfactory school progress, unsatisfactory work, or failure to comply with other requirements of the Apprentice Program.
 - (1) A first Counseling Session usually will not result in a recommendation by the LJAC that any further disciplinary action be taken.
 - (2) A second, third, or subsequent Counseling Session may result in a recommendation by the LJAC to the NJAC for probation, suspension, or removal from the Apprentice Program.

- (ii) Discipline for Poor School Performance
 - (A) Counseling of an Apprentice by the LJAC, as outlined in Section 5.3(h)(i)(A), will be the first disciplinary measure taken to address the Apprentice's failure to enroll in scheduled RTI classes, failure of required RTI classes, unauthorized drop of RTI classes, or failure to attend RTI classes after enrollment.
 - (B) When counseling an Apprentice for failure of a required RTI class, the LJAC may recommend to the NJAC that class failures be penalized on the following schedule, except that Apprentices on an approved leave of absence should not be penalized for class failures during the leave:
 - (1) One class failure: Probation
 - (2) Two class failures: Suspension
 - (3) Three class failures: Removal from the Apprentice Program
- (iii) The NJAC has the authority to act on a recommendation from a LJAC that an Apprentice be placed on probation or suspension or removed from the Apprentice Program for such causes as unsatisfactory shop progress, unsatisfactory school progress, unsatisfactory work, or failure to comply with other requirements of the Apprentice Program.
- (iv) Discipline of Apprentices as described in this Section are not subject to the grievance procedure outlined in the Collective Bargaining Agreement.

(i) Changing Trades

- (i) All Apprentices are expected to complete the Apprentice Program in the trade originally agreed upon, except in cases where the Apprentice can prove unequivocally that a change of trade is necessary due to extenuating circumstances, for example, physical disability, plant efficiency, or readjustments necessary due to training interruptions beyond the control of the Apprentice.
 - (A) If an Apprentice has left the Apprentice Program voluntarily, the interruption of training is deemed within the control of the Apprentice.
 - (B) If an Apprentice follows the advice of persons who are neither members of the NJAC or LJAC, nor LJAC Representatives, to leave the Apprentice Program due to a desire to return to his or her home plant or to relocate to another facility, the interruption of training is deemed within the control of the Apprentice.
- (ii) In the event that an Apprentice desires to change his or her Apprenticeship Agreement to indenture in a different trade, he or she must relinquish such Agreement, present a new application for Apprenticeship, and, if approved, be placed on the Apprentice Eligibility List for that trade. Necessary adjustments of Shop Hours will be made and applied to the new Apprenticeship.

Section 5.4 Reskilling Program

(a) Overview

- (i) The Reskilling Program, administered by the National Joint Skilled Trades Governance Team (the "NJSTGT") and the NJAC, provides reskilling opportunities for surplus Journeypersons in a particular skilled trade (which is the subject of an Apprentice Program) for whom placement in their trade is not possible. The Program qualifies such Journeypersons, where feasible and practical, in another skilled trade.

(b) Eligibility

- (i) Excess skilled Journeypersons in classifications (which are the subject of an Apprentice Program)

who are on indefinite layoff (“ILO”) or reduced to production are eligible to be selected for reskilling opportunities.

(c) Reskilling Selection Process

- (i) The NJSTGT will oversee the Reskilling Selection Process. Selection will follow the Preferential Placement guidelines developed by the NJAC, with the following additional considerations:
 - (A) Only classifications which are the subject of an Apprentice Program are eligible for reskilling opportunities.
 - (B) The location(s) with available opening(s) for reskilled Journeypersons will first survey excess skilled Journeypersons in classifications which are the subject of an Apprentice Program within the location(s) for reskilling opportunities. Excess skilled Journeypersons in classifications which are the subject of an Apprentice Program at the location(s) who are on ILO or reduced to production will be canvassed from a combined list.
 - (C) If openings remain, the NJSTGT will distribute a survey to all locations with excess trades which are the subject of an Apprentice Program beginning in-zone, and, if further openings remain, moving out-of-zone.
 - (D) Any remaining openings after the survey has been administered will be filled subject to further discussion by the Plan Sponsors.
 - (E) When the Preferential Placement guidelines have been exhausted, the NJAC may direct reskilling, with the agreement of the Plan Sponsors.
- (ii) A Journeyperson who is offered a reskilling opportunity must sign a Reskilling Agreement. The Journeyperson is considered a “Reskiller” within the meaning of the Reskilling Agreement as of the “on course date” on the Reskilling Agreement, which will be the date of the Journeyperson’s in-plant Reskilling Orientation.

(d) Toolboxes and Tool Sets

- (i) Reskillers will receive an appropriate toolbox and tool set for their new trade, minus the tools already provided for their prior skilled trades classification, from the Employer.

(e) Program Completion Requirements

- (i) Reskillers will complete an upfront skills assessment at their facility during the first sixty days of the Reskilling Program.
- (ii) The NJSTGT and NJAC will develop an appropriate set of program completion requirements, consisting of Shop Hours, Tasks, and Related Training Instruction, for each Reskiller based on the Reskiller’s background, experience, and skills assessment results.

(f) Evaluation Period

- (i) Reskillers are subject to a sixty (60) day Evaluation Period during which they may return to their original base classification at the discretion of either the Employee or the Employer. This period includes interviews, skills assessments, versatility matrix completion, safety training, and core skills training, among other components.
- (ii) All Reskillers will receive a new date of entry for the reskilling classification.
- (iii) After the Evaluation Period, Reskillers will revert to their original base trade classification and date of entry only in the event they are reduced from the reskilled classification for ILO (not inclusive of temporary or inverse layoff).

(g) Discipline

- (i) Reskillers are subject to the Discipline process described in Section 5.3(h).

Section 5.5 Non-Apprentice Training Program

(a) Overview

- (i) The Non-Apprentice Training Program, administered by the NJAC and the NJSTGT, provides opportunities for UAW–Ford Journeypersons to enhance their skills and knowledge by enrolling in classes at the TTC.

(b) Eligibility

- (i) UAW–Ford Journeypersons are eligible to participate in the Non-Apprentice Training Program.
- (A) All Journeypersons are eligible to enroll in Journeyperson and master license test preparation classes applicable to their trades.
- (B) All Journeyperson Electricians are eligible to enroll in code update classes required for state licensure.
- (C) Journeypersons whose facilities have a demonstrated need for Journeypersons to acquire new skills covered by the TTC’s Enhanced Training Courses are eligible to enroll in Enhanced Training Courses.

(c) Training Opportunities

- (i) Training opportunities available to Journeypersons through the Non-Apprentice Training Program generally fall in three categories:
- (A) Test Preparation Classes
- (1) Test Preparation Classes prepare Journeypersons for the State of Michigan’s Journeyperson and Master licensure tests.
- (2) Test Preparation Classes are delivered at the TTC and run one day every week for ten weeks. Courses are offered each quarter, to align with the State of Michigan’s testing schedule. Journeypersons will be released from their facilities to attend classes.
- (B) Code Update Classes
- (1) The State of Michigan requires all licensed electricians, including Journeyperson Electricians, to take a 15-hour Code Update Class once per code cycle.
- (2) The annual Code Update Class will be scheduled and delivered at the TTC for all Journeyperson Electricians.
- (C) Enhanced Training Courses
- (1) Enhanced Training Courses are delivered at the TTC and typically provide experienced Journeypersons with training in newer industry-wide technologies or training on equipment or system-specific skills needed by their facilities.
- (2) Journeypersons whose facilities have a demonstrated need for Journeypersons to acquire new skills covered by the TTC’s Enhanced Training Courses may register for Enhanced Training Courses on a space-available basis.

(d) Enrolling in Non-Apprentice Training Courses

- (i) Journeypersons who are interested in enrolling in a Test Preparation Class or an Enhanced Training Course should contact their LJAC Representative. The LJAC Representative will put the Journeyperson's request for training before the LJAC, which will decide whether to request training for the Journeyperson from the NJAC. If the LJAC makes a request for training for NJAC, the NJAC will approve or deny the request in its discretion, based on the facility's demonstrated need for Journeypersons to acquire the skills or licensure covered by the requested training and on a space-available basis.

Section 5.6 Nondiscrimination Policy

All benefits offered through the Program, including the recruitment, selection, Apprentice employment, and training of Apprentices during their Apprenticeship and of Reskillers during the Reskilling Program, shall be without discrimination because of race, color, national origin, age, sex (including pregnancy), sexual orientation, gender identity or expression, transgender status, union activity, religion, disability, veteran status, arrest record, or marital status.

ARTICLE VI
THE UAW-FORD TUITION ASSISTANCE PROGRAM

Section 6.1 Education Training Assistance Program

(a) Eligibility

- (i) Full-time, permanent UAW-represented hourly Employees who are active or on a temporary layoff, and who are Seniority Employees, are eligible for any of the tuition assistance benefits under this Section.
- (ii) Active, temporary UAW-represented hourly Employees who have been on the active employment rolls for ninety (90) days or more may utilize benefits available under the Personal Development Assistance Program only to support Industrial Readiness Certificate Program ("IRCP") classes.

(b) Benefits Offered Under the Education Training Assistance Program

- (i) The Education Training Assistance Program ("ETAP") provides for prepayment of tuition and approved fees, and reimbursement for books, in an amount up to \$6,000 per calendar year, for various forms of training assistance, including approved courses leading to a GED, associate degree, bachelor's degree, master's degree, or Ph.D. and approved certificate or diploma programs from regionally accredited educational institutions. Approved fees may include, but are not limited to, prior learning assessments, College-Level Examination Program ("CLEP") testing, and licensing fees.
- (ii) Generally, ETAP covers all courses required for high school completion or a high school equivalency certificate as well as college credit-based, university, college, business, trade, or vocational school courses or adult education classes taken as part of a degree, certificate, or diploma program at a regionally accredited institution. However, ETAP will cover the approved tuition and fees of each approved course only once. Subsequent applications for payment of tuition and fees for the same class at a later date or at another institution will be rejected.

(c) Benefits Offered Under the Personal Development Assistance Program

- (i) Personal Development Assistance ("PDA") provides for the prepayment of tuition and approved fees, including but not limited to testing and licensing fees, and books in an amount up to \$3,000 per calendar year with the approval of the Plan Administrator. PDA supports two types of educational activities: job-related education and training and Educational Enrichment Courses ("PDA-EEC"). The maximum PDA benefit available to any Employee is \$3,000 per calendar year. An Employee may choose to allocate the entire \$3,000 benefit to job-related educational activities or may allocate up to \$1,500 for PDA-EEC activities and the balance for job-related educational activities.

(ii) Job-Related Education and Training

- (A) Up to \$3,000 in PDA benefits are available to support job-related education and training, including but not limited to (1) non-credit coursework in the areas of technical skills, communication skills, and computer application courses to prepare Employees for future job opportunities and (2) career-related training for Employees affected by announced plant closings or other major restructuring events.
- (B) Eligible job-related educational activities must be undertaken at a regionally accredited institution or through a provider approved by the Plan Administrator. Examples of eligible job-related educational activities include job-related technical skills courses, including technical and licensing fees and coursework taken to support an application for licensure in the skilled trades; Industrial Readiness Certificate Program (“IRCP”) classes; Labor Studies courses and conferences; public speaking, communication, and professional development courses such as those offered by Dale Carnegie; computer classes; approved Financial Education Program courses; and other programs that may be approved by the Plan Administrator. Hobby and sports classes (*e.g.*, gunsmithing, personal training, karate) are excluded.

(iii) PDA-EEC

- (A) Up to \$1,500 of the \$3,000 PDA allotment may be used for approved tuition, fees, and books for Educational Enrichment Courses (“EECs”) taken through a regionally accredited institution, including those offered online. Subject to the approval of the Plan Administrator, EECs may include non-credit or non-degree courses as well as continuing education or professional development courses. Hobby and sports classes are excluded. EECs normally do not grant college credit but may offer Continuing Education Units.

(d) Book Reimbursement Benefits

Up to \$600 per calendar year of an Employee’s ETAP or PDA benefits may be used to purchase or rent books required for approved ETAP or PDA courses. The Plan Administrator will determine whether the books for which an Employee seeks reimbursement are associated with a course. Costs for e-books, book rentals, and books purchased through online retailers, as well as standard shipping costs, are eligible for reimbursement. Employees must seek reimbursement by the later of ninety (90) days after the term start date or thirty (30) days after the end of the course, and must be registered for and regularly attending the course(s) for which book reimbursement is sought.

(e) Aggregate Benefit Limits

Employees receiving benefits through both the ETAP and PDA (job-related and PDA-EEC courses) are eligible to receive a total of \$6,000 in assistance for tuition, approved fees, and books during any one calendar year. Any tuition assistance received by a recalled employee while on layoff during the calendar year counts towards the \$6,000 aggregate limit. Fees not approved are the responsibility of the Employee.

(f) Application Process

Employees seeking to utilize ETAP, PDA, or book reimbursement benefits should submit an online application at www.myuawford.com/. Application processing time is approximately 2-3 business days.

- (i) Applications for ETAP benefits may be submitted as early as sixty (60) days before the start of the term and must be submitted no later than forty-five (45) days after the term start date. Failure to comply with this deadline will result in the Employee being responsible for the full amount of tuition and fees. The Plan Administrator or its designee will approve or deny applications. Not all institutions, courses, and fees are approved. Employees are therefore strongly encouraged to submit an application for ETAP benefits well in advance to ensure that their chosen school, courses, and fees are approved.

- (ii) Applications for PDA benefits, including PDA-EEC benefits, must be approved by the Plan Administrator or its designee prior to the course start date. Employees are therefore strongly encouraged to submit applications at least thirty (30) days before the course start date.
- (iii) Applications for book reimbursements must be submitted no later than ninety (90) days after the term start date. Employees must include an original receipt with the application and must write their name across the receipt if the receipt does not already contain the Employee's name.

(g) Payment of Benefits

- (i) With the exception of funds awarded to purchase books, all ETAP and PDA benefits will be paid directly to the educational institution. When an Employee's application for ETAP or PDA benefits is approved, the Program will issue an Official Tuition Voucher to the Employee. The Employee will then submit the Voucher to the educational institution as payment for the course(s) for which benefits were awarded at the time of registration or when the school requires payment. The Employee is responsible for submitting the Voucher to the school by the payment due date. ETAP and PDA do not provide options for tuition reimbursement, except at approved schools that are documented as not accepting Official Tuition Vouchers. Employees should not pay tuition or fees before requesting ETAP or PDA benefits.
- (ii) The approved educational institution to which the Employee submits a Voucher must send an invoice to the Program requesting payment no later than nine (9) months from the term start date. The Employee is responsible for verifying that the school has submitted an invoice to the Program and that the Program has paid the invoice. After the nine-month period has passed, payment will become the responsibility of the Employee.
- (iii) Funds awarded to rent or purchase books, including standard shipping costs for books, will be paid directly to the Employee.
- (iv) ETAP benefits are subject to applicable federal, state, and local tax provisions. The 2020 federal exclusion is \$5,250 per year.

(h) Resolution of Disputes

Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

Section 6.2 Survivor Education and Training Assistance Program

(a) Benefits Offered Under the Survivor Education and Training Assistance Program

The Survivor Education and Training Assistance Program ("SETAP") allows the spouse or dependent child(ren) of an Employee who dies while on the active rolls, or while on a temporary layoff or medical leave (active or inactive), to utilize the remaining balance of the Employee's \$6,000 annual Tuition Assistance allotment plus one additional year's allotment of benefits, up to a maximum of \$12,000, excluding any advance payment, for college or educational pursuits during the four-year period following the date of the Employee's death. This benefit applies to approved tuition, fees, and books. If the Employee dies while on the active rolls in a work-related incident or on the inactive rolls resulting from a work-related incident, the remaining balance of the Employee's \$6,000 annual Tuition Assistance allotment, plus four additional years' allotment of benefits, may be utilized by the Employee's surviving spouse or dependent child(ren). In this instance, the maximum benefit allotment is increased to \$30,000.

(b) Eligibility

The spouse or dependent child(ren) of an Employee who dies while on the active rolls, or while on a temporary layoff or medical leave (active or inactive), are eligible for SETAP benefits during the four-year period following the Employee's death. If more than one family member (surviving spouse and/or dependent child(ren)) are eligible for this benefit, the total maximum SETAP benefit may be allocated between them.

(c) Application Process

The spouse or dependent child(ren) will receive information about the SETAP benefits available to them and how to apply for SETAP benefits from the Plan Administrator or its designee.

(d) Tax-Exempt Status of Benefits

SETAP benefits are subject to applicable federal, state, and local tax provisions. The 2020 federal exclusion is \$5,250 per year.

(e) Resolution of Disputes

Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

Section 6.3 National Vocational Retraining Assistance Program

(a) Benefits Offered Under the National Vocational Retraining Assistance Program

- (i) The National Vocational Retraining Assistance Program (“NVRAP”) provides up to \$9,400 over a four calendar-year period for tuition, fees, or books for (1) approved courses at a regionally accredited institution leading to a GED, associate degree, bachelor’s degree, master’s degree, or Ph.D.; (2) approved certificate or diploma programs from regionally accredited educational institutions; and (3) approved career-related training and advancement courses and programs. All educational activities for which NVRAP benefits are sought are subject to the approval of the Plan Administrator.
- (ii) Up to \$600 per calendar year of a Participant’s NVRAP benefits may be used to purchase or rent books for approved NVRAP courses. The Plan Administrator will determine whether the books for which an Employee seeks reimbursement are associated with a course. Costs for e-books, book rentals, and books purchased through on-line retailers, as well as standard shipping costs, are eligible for reimbursement. Employees must seek reimbursement no later than ninety (90) days after the term start date and must be registered for and regularly attending the course(s) for which book reimbursement is sought.

(b) Eligibility

Employees on indefinite layoff who (i) possess one year of Seniority as of the last day worked, and (ii) retain recall rights are eligible for NVRAP benefits. The Employee’s Seniority as of the last day worked prior to layoff determines the amount of the NVRAP benefit the Employee may receive, with a maximum benefit amount of \$9,400, as follows:

Years of Employer Seniority	Total Maximum NVRAP Benefits
1 to less than 3 years	\$7,400
3 to less than 4 years	\$8,400
4 or more years	\$9,400

The above-specified amounts are individual accounts upon which Employees may draw so long as they retain recall rights while on indefinite layoff.

(c) Aggregate Benefit Limits

- (i) NVRAP benefits are capped at the total maximum amount specified above in any four consecutive calendar year period of indefinite layoff. In no event will total NVRAP assistance to an Employee exceed \$9,400 in any four-calendar year period. The four-year period begins to run on the date the Employee first draws on their NVRAP account.
- (ii) Total tuition assistance to an Employee (taking into account NVRAP, ETAP, and PDA benefits) is capped at \$6,000 per calendar year. Up to \$600 of the \$6,000 annual benefit may be used for book reimbursements.

(d) Application Process

Participants seeking to utilize NVRAP benefits should submit an online application at www.myuawford.com/. Application processing time is approximately 2-3 business days.

- (i) Applications for NVRAP benefits may be submitted as early as sixty (60) days before the start of the term and must be submitted no later than forty-five (45) days after the term start date. Failure to comply with this deadline will result in the Employee being responsible for the full amount of tuition and fees. The Plan Administrator or its designee will approve or deny applications. Not all institutions, courses, and fees are approved. Participants are therefore strongly encouraged to submit an application for NVRAP benefits well in advance to ensure that their chosen school, courses, and fees are approved.
- (ii) Applications for book reimbursements must be submitted no later than ninety (90) days after the term start date. Participants must include an original receipt with the application and must write their name across the receipt, if the receipt does not already contain the Participant's name.

(e) Payment of Benefits

- (i) With the exception of funds awarded to purchase books, all NVRAP benefits will be paid directly to the educational institution. When a Participant's application for NVRAP benefits is approved, the Program will issue an Official Tuition Voucher to the Participant. The Participant will then submit the Voucher to the educational institution as payment for the course(s) for which benefits were awarded at the time of registration or when the school requires payment. The Participant is responsible for submitting the Voucher to the school by the payment due date. NVRAP does not provide options for tuition reimbursement, except at approved schools that are documented as not accepting Official Tuition Vouchers. Participants should not pay tuition or fees before requesting NVRAP benefits.
- (ii) The approved educational institution to which the Participant submits a Voucher must send an invoice to the Program requesting payment no later than nine (9) months from the term start date. The Participant is responsible for verifying that the school has submitted an invoice to the Program and that the Program has paid the invoice. After the nine-month period has passed, payment will become the responsibility of the Participant.
- (iii) Funds awarded to rent or purchase books, including standard shipping costs for books, will be paid directly to the Participant.
- (iv) Any combination of Tuition Assistance benefits totaling over \$5,250 per calendar year is subject to applicable federal, state, and local tax provisions.

(f) Resolution of Disputes

Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

Section 6.4 Daily Allowance for Laid-Off Employees Utilizing Tuition Assistance Benefits

- (a) Seniority Employees on layoff who are not receiving Supplemental Unemployment Benefits or Guaranteed Income Stream benefits while participating in full-time targeted vocational retraining programs, job-seeking skills workshops, or other formal job placement counseling or related services arranged or approved by the Plan Administrator or its designee may be eligible for a daily allowance of \$20, subject to the approval of the Plan Administrator. The allowance will be reduced by any other allowance or similar payment Employees are eligible to receive from other sources, including federal, state, or local government programs.
- (b) Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

Section 6.5 Education or Training Recall Deferral

- (a) Laid-off Seniority Employees who are recalled to their basic seniority unit but are engaged in education or training courses under the ETAP, PDA, or NVRAP may defer their return to work to complete the courses in which they are then enrolled. Recalled employees seeking a deferral must proceed in accordance with the relevant provisions of the Collective Bargaining Agreement, and provide notice and evidence of course enrollment to the Employer and must apply for reinstatement, providing evidence of continuous participation in the courses, within five (5) days of the date their courses are completed, or they discontinue their participation.
- (b) Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

Section 6.6 Retiree Tuition Assistance Program

(a) Benefits Offered Under the Retiree Tuition Assistance Program

The Retiree Tuition Assistance Program (“RETAP”) provides up to \$2,000 per calendar year per retiree for the prepayment of tuition and compulsory fees for courses approved by the Plan Administrator or its designee.

- (i) Retirees may use the \$2,000 allotment to take approved classes offered by the Plan Administrator to active Employees at UAW–Ford facilities, local Union halls, or other approved program delivery sites.
- (ii) Retirees who live in areas without a local UAW–Ford facility or local Union hall may apply their full RETAP benefits to tuition and fees for courses at approved colleges or universities. This includes approved courses leading to credits or degrees at regionally accredited educational institutions, or courses included in a special range of approved competency-based areas, including non-credit and non-degree courses or activities.
- (iii) Retirees who live near an existing UAW–Ford facility or local Union hall may use one-half of their RETAP benefits (\$1,000 per calendar year) to attend classes at approved colleges or universities.

(b) Eligibility

Retirees, as defined in Section 1.16 of the Plan, are eligible for RETAP benefits except that any Employee who waived their eligibility for RETAP benefits as part of a retirement incentive package may not receive an award under this Section.

(c) Application Process

Participants seeking to utilize RETAP benefits should submit an online application at www.myuawford.com/. Application processing time is approximately 2-3 business days. Applications for RETAP benefits must be approved by the Plan Administrator or its designee prior to the course start date. Retirees are therefore strongly encouraged to submit applications at least thirty (30) days before the course start date.

(d) Payment of Benefits

- (i) All Tuition Assistance benefits will be paid directly to the educational institution. When a Participant’s application for RETAP benefits is approved, the Program will issue an Official Tuition Voucher to the Participant. The Participant will then submit the Voucher to the educational institution as payment for the course(s) for which benefits were awarded at the time of registration or when the school requires payment. The Participant is responsible for submitting the Voucher to the school by the payment due date. RETAP does not provide options for tuition reimbursement, except at approved schools that are documented as not accepting Official Tuition Vouchers. Participants should not pay tuition or fees before requesting RETAP benefits.
- (ii) The approved educational institution to which the Participant submits a Voucher must send an invoice to the Program requesting payment no later than nine (9) months from the term start date. The

Participant is responsible for verifying that the school has submitted an invoice to the Program and that the Program has paid the invoice. After the nine-month period has passed, payment will become the responsibility of the Participant. Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

- (iii) Any combination of Tuition Assistance benefits totaling over \$5,250 per year is subject to applicable federal, state, and local tax provisions.

(e) Resolution of Disputes

Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

Section 6.7 Tuition Assistance for Employees on Leaves of Absence

- (a) Employees on an approved Union leave of absence, public office leave of absence, Peace Corps leave of absence, or credit union leave of absence are eligible to receive ETAP, PDA, and NVRAP benefits, consistent with all other terms of the Tuition Assistance Program. Employees on an approved educational leave or on medical leave are not eligible for benefits under the Tuition Assistance Program
- (b) Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

Section 6.8 The UAW–Ford Community Engagement Scholarship Program for Dependent Children

(a) Benefits Offered Under the UAW–Ford Community Engagement Scholarship Program for Dependent Children

The UAW–Ford Community Engagement Scholarship Program for Dependent Children (“CES”) is designed to invest in, engage, and assist the communities in which Employees live and work by helping the college-age dependent children of Union–represented Employees to pursue post-secondary education. CES benefits reimburse Employees with eligible dependent children up to \$1,500 per calendar year per dependent child for tuition and fees at a qualifying post-secondary educational institution.

(b) Eligibility

- (i) Dependent children of active Employees or of active Employees’ spouses, and dependent children of Employees (or of their spouses) on an approved leave of absence (Union, public office, Peace Corps or Credit Union), who are pursuing post-secondary education (excluding graduate degree courses) at a post-secondary educational or vocational institution that qualifies for federal student financial aid (Title IV) and is accredited by a regional, governmental, or nationally recognized agency are eligible for the UAW–Ford Community Engagement Scholarship.

To qualify for the Scholarship, an eligible dependent must be:

- (A) The child by birth, legal adoption, or legal guardianship of an active (or on approved leave) Employee or an active (or on approved leave) Employee’s spouse. The Employee must be active, on approved leave or on a temporary layoff on the start date of classes;
- (B) Unmarried and aged twenty-six (26) or under at the time of course enrollment;
- (C) Residing with the Employee or the legal responsibility of the Employee or the Employee’s spouse;
- (D) Pursuing post-secondary education (excluding graduate degree courses); and
- (E) Attending a post-secondary educational or vocational institution that qualifies for federal student financial aid and is accredited by a government agency or a nationally or regionally recognized agency.

(c) Benefit Limits

The Scholarship is limited to a maximum annual benefit award of \$1,500 per calendar year per eligible dependent child for tuition and/or compulsory fees.

(d) Application Process

- (i) Eligible dependent children may apply for the Scholarship by completing an application at www.myuawford.com after completing the coursework for which reimbursement is sought. The deadline to apply for Scholarship benefits is June 1 of the calendar year following the calendar year in which courses began (*e.g.*, for a course that began any time in 2019, the Scholarship application is due June 1, 2020).

As part of the process, applicants must provide the following information:

- (A) Verification of dependency. If the dependent child is recognized as a dependent under the Employer's health care plan, no further verification of dependency need be provided. If not, the dependent child's birth certificate, adoption papers, or a court order showing legal guardianship will be required as verification of dependency and, where appropriate, the dependent child's driver's license or state ID. If the dependent child is a child of the Employee's spouse, the applicant must also submit a valid marriage license for the Employee and spouse.
- (B) Proof of satisfactory completion of term coursework with an average GPA of 2.0 or better, based on a 4.0 scale, for the course(s) for which reimbursement is being requested. The documentation submitted must include the name of the school and the student;
- (C) Verification of payment for the course(s) for which reimbursement is being requested. The applicant must provide an itemized summary of their student account from the educational institution, showing charges for tuition and fees and payment(s) made. The documentation submitted must include the name of the school and the student; and
- (D) A Verification of Volunteer Service Form (available at www.uawford.org/scholarships) documenting the applicant's completion of eight (8) community service volunteer hours at a 501(c) organization, public school, or public library in the year for which reimbursement is requested. The community service activity must be non-partisan and not for profit. Eight (8) hours of community service must be performed for each year the Scholarship benefits are requested.

(e) Payment of Benefits

- (i) The Scholarship Program will reimburse Employees once the eligible dependent child completes the course(s) for which benefits are sought and the required documentation is submitted. The reimbursement will be deposited in the Employee's financial institution separate from their regular paycheck.
- (ii) Payments under the Scholarship Program will be subject to applicable federal, state, and local income tax provisions.

(f) Resolution of Disputes

Disputes arising under this Section may be the subject of an appeal under Section 3.4 of the Plan.

ARTICLE VII
THE UAW–FORD EMPLOYEE SUPPORT SERVICES PROGRAM

Section 7.1 General Program Description

The UAW–Ford Employee Support Services Program (“ESSP”) provides benefits to help Employees in resolving personal and work issues that impact health, well-being, and job performance. The benefits it administers are:

- (a) The Wellbeing and Fitness Center Program

Section 7.2 Wellbeing and Fitness Center Program

(a) Benefits Offered Through the Wellbeing and Fitness Center Program

- (i) The Wellbeing and Fitness Center Program creates and maintains safe and effective Fitness Centers, with a focus on cardio, strength, weightlifting, and group exercise, at certain UAW–Ford facilities that are available for Participants’ use.
 - (A) Employees may use onsite or near-site Fitness Centers at any time during their hours of operations.
 - (B) Hourly employees at Parts Supply and Logistics (“PS&L”) locations who do not have access to onsite or near-site UAW–Ford fitness centers will receive an annual voucher of \$250 for use at an approved local gym. The Plan Administrator or its designee will approve external fitness providers.
 - (C) Retirees may use onsite or near-site Fitness Centers on a space available basis, at non-peak usage periods, when the Fitness Center is in operation. The schedule of usage will be determined by the Plan Administrator or its designee based on factors such as the location of the Fitness Center, present hours of operation, present Employee usage, and other criteria.

(b) Eligibility

- (i) All Union-represented hourly active Employees, including short-term supplemental (“STS”) and temporary part-time (“TPT”) Employees, and Ford salaried Employees, including supplemental salaried Employees, are eligible to use onsite or near-site Fitness Centers.
- (ii) Union-represented hourly active Employees at PS&L locations who do not have access to an onsite or near-site Fitness Center are eligible for a fitness voucher.
- (iii) Retirees are eligible to use onsite or near-site Fitness Centers on a space available basis, at non-peak usage periods, when the Fitness Center is in operations.

(b) Accessing Wellbeing and Fitness Center Program Benefits

- (i) Employees can access onsite or near-site Fitness Centers by showing their Ford badge upon arrival at the Fitness Center.
- (ii) Hourly employees who are eligible for a Fitness Voucher to be used at an approved external fitness provider may apply for a Voucher through a written process to be established by the Trustees and adjusted from time to time as circumstances warrant.
 - (A) Fitness Voucher benefits are subject to all applicable federal, state, and local taxes.
- (iii) Retirees seeking to use onsite or near-site Fitness Centers will be required to present proof of eligibility and to complete a liability waiver.
- (iv) Retirees seeking to use onsite or near-site Fitness Centers should contact the facility’s Local ESSP Representative or the National UAW-Ford Employee Support Services Program at 313 392 7000 for information on hours, access, eligibility and the liability waiver.