

## Upstream's Benevolent Fund for Associate Hardship Criteria

The Upstream's Benevolent Fund for Associate Hardship has been created to provide financial assistance to Associates in the case of an acute emergency and other dire circumstances. The fund will be financed by contributions from Upstream associates through tax-deductible gifts. Contributions to the Benevolent Fund for Associate Hardship may be made through any of the following options: payroll deduction, PTO cash-out, personal check or through an online donation portal.

**Eligibility:** Associates under any employment status of Upstream are eligible to receive grants as follows:

- Full or regular part-time associates (24 hours/week) actively employed or under any employment status by Upstream Rehabilitation
- Six or more months of continuous service
- No disciplinary or performance warnings for the 6-month period prior to the application date.
- Have experienced a qualifying incident within the past 90 days

**Qualifying Incident:** The following are the criteria for an incident to be qualified as a reason for a grant:

- One-time event outside the employee's control such as sickness/medical emergency, accident, loss of housing, catastrophe, personal tragedy, natural disaster
- Unexpected and unforeseeable
- Directly affects the associate financially
- Have exhausted/is utilizing other means of funding (insurance, savings, social services, etc)
- Must use the money for housing, utilities, food, transportation, child care, or similar necessities for which money is not available due to the incident
- The grant is not to cover the impact of loss of income due to a cutback in hours or unemployment, unrelated credit card debt, home foreclosure, accumulated financial distress, or failure to plan, except for in cases of declared national or state emergencies or disasters, exemptions to this criteria will be considered

**Application Process:** To submit an application, an eligible associate should:

- Contact the fund administrator to discuss the associate's eligibility and determine whether the incident is likely to qualify the associate to receive a grant
- Submit a complete application within 90 days of the incident
- Certify that the application is true and accurate

**Grants:** Grants are made upon the recommendation of the Benevolent Fund for Associate Hardship Advisory Committee as follows:

- Grant limit: normally \$1,000. Grants are limited to a cumulative amount of \$3,500 in a 365 day period.
- Grants are made by check from the fund and are typically payable directly to the vendor (landlord, utility company, or other vendor). The Benevolent Fund for Associate Hardship Advisory Committee is composed of 3 senior executive leaders, the Executive Director of Philanthropy for the company and a member of the staff of the Foundation for Enhancing Communities (TFEC). No member of the advisory committee may receive a grant for two years following their service.