

## BENEFIT PLANS

MEBA MEDICAL & BENEFITS PLAN  
MEBA PENSION TRUST  
MEBA TRAINING PLAN  
MEBA VACATION PLAN

1007 EASTERN AVENUE, BALTIMORE, MARYLAND 21202-4345 • (410) 547-9111

### MEBA TRAINING PLAN SUMMARY OF MATERIAL MODIFICATION

This Summary of Material Modification advises you of changes in the information contained in the Rules and Regulations of the MEBA Training Plan (“Plan”), as required by the Employee Retirement Income Security Act of 1974. The Trustees of the MEBA Training Plan have amended the Plan to make modifications related to eligibility for attendance at the Calhoon MEBA Engineering School (“CMES”) and the reimbursement of tuition expenses (including for training at an alternate location). The Plan has been changed as described below.

#### ELIGIBILITY AND REIMBURSEMENT

Effective November 1, 2016, the Trustees amended the Plan to make various modifications related to eligibility for attendance at CMES, reimbursement of tuition expenses, and application requests for training and reimbursement at a location other than the CMES. Accordingly, effective November 1, 2016, the Plan was amended as follows:

- a. Article I, Section 1(A) of the Plan was amended by adding the following as subparagraph (e) and renumbering the previous subparagraph (e) as (f):

(e) Applies to attend the training on a form approved by the Trustees and such application is approved by CMES Administration.

- b. The second paragraph of Article I, Section 1(E) of the Plan was amended to read as follows:

When such courses are not provided by, or suitably scheduled at CMES, the tuition for such courses shall be reimbursed in accordance with Section 6; provided the reimbursement request is accompanied by a completed *Request for Alternate Location Training Form*.

- c. Article I, Section 3 of the Plan was amended to read as follows:

#### ***Section 3 Application Requests for Training and Tuition Reimbursement Outside the Calhoon MEBA Engineering School (CMES)***

Application for reimbursement of tuition fees associated with approved training other than that offered or scheduled at CMES shall be made on a form or forms approved by the Trustees of this Plan.

- d. Article I, Section 5 of the Plan was amended to read as follows:

***Section 5 Approval to Attend Training at a Location Other Than the Calhoon MEBA Engineering School (CMES)***

Requests by members to attend training covered by Section 2 shall be made to the CMES Director by written application, which shall be in accordance with Section 3. Validation of eligibility as per Section 1 shall be made by the CMES Administration. The CMES Director is authorized to approve or deny the request.

- e. Article I, Section 6 of the Plan was amended to read as follows:

***Section 6 Reimbursement***

The member shall be reimbursed for tuition expenses and/or related registration fees for training when:

- advanced application to attend the training is made to CMES and eligibility is validated by CMES;
- the training is approved by the CMES Director in writing;
- evidence of successful completion of the training is provided; and
- evidence of tuition and/or registration fee payment is provided.

A member may receive reimbursement of tuition fees for upgrading of his/her USCG license; however, he/she may be reimbursed once only for the same licensure level and/or type.

Members of and applicants for membership in District No. 1-PCD MEBA, who do not meet the eligibility requirements of Section 1(A), shall be reimbursed the tuition for courses under Sections 1(E) and 1(F), when such courses are not provided by, or suitably scheduled at CMES, according to the rules set forth in Sections 1(E) and (F) and this Section 6.

- f. Article I, Section 7 of the Plan was amended to read as follows:

***Section 7 Maximum Reimbursement Fees***

The maximum reimbursement amount for approved training completed by any eligible member is established by the CMES Administration and as approved by the Trustees.

- g. Article I, Section 10 of the Plan was amended to read as follows:

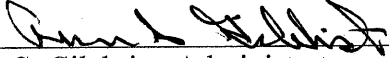
***Section 10 Reimbursement of Costs to Attend Certain Government Training***

- (a) If a member eligible under Section 1(A) attends a government required training program, which has been approved in advance by the Trustees, and pays out-of-

pocket for such training, the member will be reimbursed for tuition fees, room and board and transportation expenses to attend such training in accordance with this Section, provided that: (i) his/her application to attend such training included evidence of written sponsorship of a participating Company; or (ii) the School receives from the government or from a participating Company an amount which equals the reimbursement it will pay to the officer under this Section.

- (b) Frequency of reimbursement is based on contractual training requirements defined by the government for the billet held by or which will be held by the member.
- (c) Expenses authorized for reimbursement are actual, reasonable room and board and transportation expenses incurred in connection with the training. The member shall submit to the CMES Administration paid receipts and proof (certificate of completion) that the training was successfully completed. Application for reimbursement under this Section shall be made on applicable forms in accordance with Section 3. Transportation Reimbursement will be provided in accordance with Section 9(b) unless circumstances covered by Section 10(a)(ii) take precedence

Please contact the Calhoon MEBA Engineering School if you have any questions.



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Ann S. Gilchrist, Administrator