

Colonial Williamsburg

Benefits in Brief

**For Employees of
The Colonial Williamsburg Foundation,
Colonial Williamsburg Company and Williamsburg Development, Inc.**

The eligibility requirement for certain elective benefits requires an employee to complete 1,200 hours in a plan year to maintain continued benefit eligibility. Other benefits may require a 1,000 hours minimum.

Health Care and Dental Plans

Eligible regular employees must enroll within 31 days of their first day of employment or within 31 days of a qualifying event. Benefits become effective on the first of the month following 30 days of employment. Employees may select employee only, employee and one dependent child, employee and spouse or employee and family coverage. Eligible employees may include their domestic partner under their health plan. Employees may choose from two plans: a health maintenance organization (HealthKeepers), or the Anthem high deductible health plan (HDHP) with health savings account (HSA). Colonial Williamsburg pays a significant portion of the cost of these benefits. Most employee's contributions are made through payroll deductions on a pretax basis. Eligible employees may choose from two dental plans, a basic dental plan and an enhanced plan. A voluntary Accident Plan and Voluntary Hospital Indemnity Plan are available to offset any out of pocket medical expenses.

Wellness Revolution Program

All benefit eligible employees are eligible to join the Wellness Revolution. The Program provided by Virgin Pulse includes a web portal to set, track and monitor your personal health goals, employee challenges, Wellness Fairs and more.

Medical Spending Account

The Medical Spending Account, a TAP program, allows employees to use pre-tax wages to pay for medical expenses not covered by health insurance plans. Employees estimate how much to set aside for things like glasses, orthodontia and copayments for doctors' visits and prescription drugs.

Dependent Care Spending Account

The Dependent Care Spending Account allows employees to use pre-tax wages to pay for dependent care while they are at work. A legal dependent is a child under 12 years of age or younger or any other person who is not self-sufficient, lives in the employee's home, and may be claimed as a dependent for taxes.

Retirement Income

Employees 21 years of age or older become participants in the Colonial Williamsburg Pension plan after completion of one year of credited service. The entire cost of the plan is paid by Colonial Williamsburg; employees do not make contributions. Retirement benefits are based on an employee's length of service and highest earnings over a consecutive five-year period. Employees are vested in the plan after five years of credited service and can elect early retirement at the age of 50 after 10 years of credited service.

401(k) Tax-Deferred Savings Plan and Roth 401(k) Plan

Employees age 21 or older may enroll in the 401(k) tax-deferred savings plan or a Roth 401(k) plan. The tax-deferred plan is designed to help employees save for retirement by allowing them to put pre-tax money aside through payroll deduction and invest it in a choice of different funds. The Roth 401(k) Plan is an alternative post tax savings option. Colonial Williamsburg matches employee contributions at \$.25 per dollar on the first 4% of salary. Taxes on the money contributed and on investment earnings are deferred until withdrawn from a 401(k) account. It is recommended that employees start saving early in their careers, even if it is a small percentage.

Life Insurance

Colonial Williamsburg provides basic life insurance at no cost to each regular employee. Employees are insured on the first of the month following 30 days of employment. Eligible regular employees may purchase additional coverage from one time to three times their annual salary. The cost per \$1,000 of coverage is based on age. The employee’s share of the cost is made through payroll deduction on a pretax basis. An equal amount of Accidental Death and Dismemberment Insurance coverage is also provided at no cost to regular employees. Eligible regular employees may purchase \$25,000 or \$50,000 in spousal life and/or \$15,000 in dependent life insurance coverage.

Travel Accident Insurance

Employees are covered by travel accident insurance paid for by Colonial Williamsburg.

Holidays

Employees enjoy the following paid holidays:

New Year’s Day	Independence Day
Martin Luther King, Jr.’s Day	Labor Day
Presidents’ Day	Veterans Day
Memorial Day	Thanksgiving Day
Juneteenth Day ¹	Christmas Day
Employee’s Birthday ²	

¹ Non-Bargaining unit employees only

² Bargaining unit employees only

Paid Vacation

Regular employees accrue vacation benefits from date of hire. The amount of vacation earned is based on hours worked and length of service. Non bargaining unit employees may use vacation benefits after 90 days of employment. Bargaining unit employees may use vacation benefits after 12 months of employment.

Annual Vacation Benefit for Regular Employees

Years of Service	Amount of Vacation
0-4	2 weeks
5-14	3 weeks
14-up	4 weeks

Service Bonus

As a part of service recognition, bonus vacation may be taken in cash or as time off with pay.

For the 10th year of eligible service...	5 days
For the 15th, 20th years of eligible service	10 days
For the 25 th , 30th and 35th years of eligible service.....	15 days
For the 40th and 45th years of eligible service.....	20 days
For the 50th year of eligible service.....	25 days

Sick Pay

Regular employees accrue sick pay from date of hire. The number of sick pay hours earned is based on hours worked and length of service. Nonbargaining unit employees may use sick pay after 90 days of employment; bargaining unit employees may use sick pay upon achieving regular status. A short term disability plan is available to non-bargaining unit employees for coverage up to 24 weeks.

Other Time Off

Colonial Williamsburg supports employees in times of special need by making available time off for education, family, military service, medical needs, and bereavement.

Workers’ Compensation and Supplemental Benefit

In the event of on-the-job accidents or occupational diseases, disability benefits are provided to all employees as specified in the Virginia Workers’ Compensation Act. In addition, Colonial Williamsburg provides a supplemental benefit.

Long-term Disability

Eligible employees who become totally disabled may apply for a disability benefit.

Educational Assistance Program

With the prior approval of a manager, Colonial Williamsburg will pay tuition costs in advance for job-related courses, seminars, and workshops.

529 College Savings Plan

Employees have the option to start saving in the Vanguard 529 College Savings Plan or the State of Virginia 529 College Savings plans via the Vanguard online portal.

Public Service Loan Forgiveness

The Foundation qualifies as a public service organization to help you qualify for this trial student loan forgiveness program (federal direct loan). For more information, visit the Federal Student Aid website.

<https://studentaid.ed.gov/sa/repay-loans/forgiveness-cancellation/public-service>

College Degree Program

The Foundation will pay tuition costs and student fees for benefit eligible regular employees who successfully complete courses in a special associates degree program at Thomas Nelson Community College.

Employee Assistance Program

This program is intended to provide confidential, professional assistance to employees who want help with personal problems. Services include:

Family Counseling (marital, adolescent and child, medical, emotional)

Substance Abuse Counseling (alcohol and drugs)

These services can be accessed through the intranet, internet (www.OptimaEAP.com), or by calling 1-800-899-8174.

Credit Union

Employees of Colonial Williamsburg may join 1st Advantage Federal Credit Union. This is a nonprofit financial institution. 1st Advantage Federal Credit Union offers free budget, credit and debt counseling services to all Colonial Williamsburg employees.

Passes

Passes are issued to all Colonial Williamsburg employees and their dependents, ages 6 through 26, who are living with them. The pass admits

the holder to Colonial Williamsburg exhibition sites, buses, films and lectures. Employees' children under the age of 6 are admitted free to these activities when accompanied by an adult with a pass. Retired employees receive lifetime passes.

Discounts

Active and retired employees are entitled to discounts at CW retail stores, admission tickets, and on meals at selected Colonial Williamsburg restaurants.

Please Note

Bargaining Unit benefits are mandated by the Collective Bargaining Agreement and may differ from those listed. There are slight variations to these benefits in some work units. Check with your manager for more details.

For questions, please use the numbers listed:

Spending Accounts, HealthCare, Dental Plans, HSA, Vision Plan (757) 220-7625

Retirement, 401(k), Discounts (757) 220-7122
Life Insurance

Workers Compensation (757) 220-7383

Long Term Disability (757) 220-7122

College Degree Program (757) 220-7163

The Foundation hopes and expects to continue each plan indefinitely, but it retains the unilateral right to terminate, suspend, withdraw, amend, or modify any plan, covering any active employee or current or future retiree, in whole or in part at any time and from time to time. For more information about Colonial Williamsburg, visit our website: history.org.

This document includes only brief summaries of the plans' provisions. Every attempt has been made to make this brochure accurate. In the event that the terms of this summary and the plan document conflict in any way, the plan document shall prevail.