

Standard Operating Procedure (SOP)

Title: Technical Trades Tool Grant

Effective Date: 12/1/2025

Revision #: 1.0

Prepared by: Workforce Development Department Technical Trades Manager

1. Purpose

The purpose of this SOP is to establish clear guidelines and procedures for the administration of the Tessera Technical Trades Tool Grant. The grant supports employees in technical trades positions by reimbursing costs for necessary tools that enable job performance, skill development, and upward mobility.

2. Scope

This SOP applies to all Tessera employees who are in or training for a technical trades position and meet the eligibility criteria outlined herein. The focus of this program is to support the following:

- New entry-level hires who may face financial barriers to obtaining required tools.
- Encourage replacement of old or damaged tools to improve safety.
- Enhance job satisfaction and support employee retention.
- Promote engagement and continuous improvement through shared tool insights.

3. Responsibilities

- **Tool Grant Advisory Board:** review and approve tool grant applications.
- **Workforce Development Technical Trades Coordinator:** Maintain records, keep board meeting notes, update Tool Grant Spreadsheet, email managers for approval and employee status, track employee award amounts.
- **Workforce Development Technical Trades Manager:** Program oversight and budget tracking.

3. Definitions

- **Good Standing:** An employee who has not had a documented written disciplinary action in Workday and/or has not been on a PIP (Personal Improvement Plan) within the past 12 months.

4. Tool Grant Advisory Board Composition

The Tool Grant Advisory Board shall include at a minimum the following members:

1. Workforce Development Vice President
2. Workforce Development Technical Trades Manager
3. Finance Representative
4. Fleet Services Operations Representative
5. One Technical Trades Employee

5. Eligibility Criteria

To be eligible for a Tool Grant, an employee must:

1. Work for Tessera within, or be attending in-house training to move into, a technical trades position.
2. Be in a position that requires personal tool use and the requested tools are required for your work.
3. Be in a good standing per definition.
4. Temporary employees are not eligible for this program..
5. Not have submitted their notice of resignation
6. Tool need and cost must be approved by Site Manager before submitting grant request.
7. Upgraded tools are not eligible unless the new tool is a safer, more efficient tool and the existing tool is not under warranty.
8. Prior purchases are not eligible for grant application.
9. \$500 limit on approved toolboxes only.

Limitations:

- Tool Grant Awards and Tuition Assistance Awards shall not exceed the federal limit of \$5,250 per calendar year per employee.
- Each employee has a lifetime limit of \$5,250 to use under this program. (Subject to change depending on funding and usage.)
- Government Furnished tools are not allowed under this program.
- Tools requiring calibration are not allowed under this program.

- The Tool Grant Program does not cover tools, equipment, or resources requested as workplace accommodations. Any accommodation-related tools must be formally requested through the Tessera VOC Department in accordance with established accommodation procedures.
- Newly awarded contract employees are eligible to apply after 90 days from contract start date.

7. Application Procedure

1. Employee identifies necessary tool(s) and confirms the requirement with their manager.
2. Employee submits a grant request to the Tool Grant Advisory Board via the My Tessera, Technical Trades Tool Grant Application Link.
3. TTC Coordinator receives the application and emails the employee's manager to confirm the employee is good standing and the need for the tool(s).
4. TTC Coordinator confirms employee's requested dollar value does not exceed federal limits
5. Applications are reviewed monthly by the Tool Grant Advisory Board and Applicant Site Manager is invited to attend to speak on behalf of applicant.
6. Employee will be notified of approval or denial via email. Approvals include an Acceptance Letter. The letter will provide instructions for:
 1. How to apply for reimbursement
 2. What to do if the tool price(s) have increased
 3. What to do if there is a financial hardship to upfront purchase

8. Tool Purchase and Reimbursement Procedure

1. Approved employees purchase tools.
2. Employees submit the following within 30 days of approval to Techtrades@tessera.org:
 - Receipt(s) for purchased tool(s)
 - Completed Employee Tool Grant Reimbursement Form
 - TTC Manager will review and forward to AP with proper coding for reimbursement to employee.

3. If a financial hardship exists, tools will be purchased on a company credit card. The CC receipt must be forwarded to techtrades@tessera.org.
 - o TTC Manager will review and forward to AP with proper coding for charge to the Tool Grant Funding.
4. Finance will process reimbursement (or post CC receipts to) the Tool Grant Fund.
5. If an employee receives a refund for the purchase, the refunded amount must be returned to Tessera and will be added back to the Tool Grant Fund.

9. Additional Guidelines

- Employees may apply for the Tool Grant multiple times per year, as long as the total reimbursement does not exceed limits.
- Managers must verify the necessity of all requested tools.
- Exceptions to eligibility may be considered by the Tool Grant Advisory Board on a case-by-case basis.

10. Recordkeeping

- All applications, approvals, receipts, and expense forms shall be retained by the Workforce Development Department for a minimum of five (5) years.
- Documentation will be reviewed periodically to ensure compliance with federal limits and internal policy.

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