

LIFE AT COLLEGEWISE

OUR EMPLOYEE HANDBOOK

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FOUNDER & HEAD OF TALENT

Welcome to Collegewise

Starting at any new place of work can make you feel like the new kid at school. You don't know anyone. You don't know how things work. It would be a lot easier to get off to a great start if somebody just laid it all out for you. We want you to feel right at home as quickly as possible, without any undue awkwardness or adjustment pains. That's why we wrote Life at Collegewise.

We tried to think about all the things a new Collegewise employee might want to know, like “When do I get paid?” and “How do I expense things?” and “Seriously, what is an APJECK?” In this handbook, we'll explain how we handle vacations, parental leave, and sick days. And we'll describe our culture and values, like what we stand for, how we should work together, and how we recognize greatness here.

Here's what you won't find much of in our handbook: specific legislation for your every thought and action while you're working at Collegewise. We hire smart, trustworthy people who don't need a fifty-page manual of rules and regulations to dictate how to treat our work, our customers, or each other. We think you're one of us—that's why you're here. So, when we have a policy or a rule, we'll say so clearly and explicitly. Otherwise, we'll trust you and rely on your judgement. If you're unsure, please ask your manager or any of our leadership.

And most importantly, we've tried to keep Life at Collegewise honest. Some companies' handbooks are full of idealized descriptions of culture and missions that sound great on paper but don't happen in practice. Handbooks like that are a sham. We're proud of what we've built, but no company is perfect. Let's be honest with each other, starting right now. And consider this your invitation to help us make Collegewise an even better place to work for everyone.

We hope Life at Collegewise helps make your first few weeks—and hopefully your entire career—here as comfortable and rewarding as possible.

Let's do great things together.

All the best,

Kevin McMullin
Founder & Head of Talent

The Collegewise story

In August of 1999, Kevin McMullin started Collegewise out of his apartment in Mission Viejo, California. He worked with nine students that fall, driving to kids' houses and doing college counseling in living rooms and at kitchen tables. He didn't have a formal business plan (he still doesn't know what those are), but the strategy was pretty simple: Know what you're talking about. Give great advice. Be the counselor kids like and parents trust. Get them excited about the process. Do the right thing. Take care of your customers. And while you're at it, don't embarrass yourself or the profession. You won't read about that approach in a case study at Harvard Business School. But it worked for Kevin. One year later, over 100 families were enrolled in the program and Kevin was no longer the only counselor.

From 2001 to 2012, Collegewise grew steadily from one office to four. We hired former admissions officers to join us and then trained them how to counsel the Collegewise way. We presented at conferences. We donated our time to under-resourced schools and programs. We signed contracts with high schools, published a book, and started a [blog](#), which Kevin wrote every day for ten years. We also weathered two recessions, three different versions of the Common Application, and the brief but alarming era of Nickelback (that was a close one).

In 2013, Kevin sold Collegewise to The Princeton Review (TPR)—you can learn more [here](#) about Kevin's decision. We spread to 11 states and hired 25 more remarkable counselors to join us. We doubled in size in 2013 and again in 2014. That partnership also reunited Kevin with friend and mentor Paul Kanarek, one of the original founders of The Princeton Review and Kevin's first boss. In 2015, Kevin and Paul, along with fellow Wisen Arun Ponnusamy and recently added business partner Joel Block, bought Collegewise back from The Princeton Review. You can learn more about that decision [here](#).

In 2017, after nearly a year of putting the deal together, Collegewise became a part of Verlinvest, a global investment holding company. We saw in Verlinvest not just an opportunity to expand internationally and make Collegewise the largest provider of college counseling in the world, but also a partner who appreciated everything about Collegewise that we didn't want to change—our culture, our people, and our approach to both work and counseling.

Today, Collegewise is the largest college counseling company in the world. We've helped more than 24,000 kids attend hundreds and hundreds of domestic and international colleges, including all the famous ones. But more importantly, after all this growth and several changes in ownership, we still run a business we're proud of, the kind that takes care of its people and its customers and would never, ever use a phrase like, "We apologize for any inconvenience this may have caused." (Has anyone ever felt better when a company tells you that?)

And best of all, we're not done yet.

The Collegewise vision

A vision is different from a business plan. How many people we hire, where we choose to grow, even what business(es) we're in—these elements can and should shift over time as our company, the market, and the world change. But our vision is a destination, a true north, a fixed point where we'll always focus our efforts. And it has to pass the sniff test. Nobody is inspired by a vision that's bold on paper but disingenuous in practice.

From students to colleagues to entire teams, there's something about this place that inspires people to give, do, and accomplish more than ever seemed possible. This vision is our effort to identify, claim, and protect that magic.

Collegewise believes that the right environment can inspire people to discover their potential. We've seen it with our students matched with the right counselor, tutor, or college. We've seen it with our colleagues presented with the right manager, team, or opportunity. And we are at our best when we work together to create these environments of people, principles, and projects. As we build a worldwide organization to help students achieve their goals and employees to do their best work, we will drive our decisions with two questions: what kind of environment will this create, and how will it inspire everyone involved to discover their potential?

How can we all reach for this vision?

We do it by thoughtfully considering our decisions, both big and small. With everything we do, each of us should ask what it's for, who it's for, and what we're hoping will happen as a result of it.

This open position—why are we filling it, and how can we find the person who will make the environment even better for their customers, their teammates, and our company?

This project and the team—who will work on it, and how can we make the experience, the effort, and the result one that will make everyone involved proud to have participated?

This new product we're about to introduce, this division we're proposing to launch, this company we're considering acquiring—what environment will it create, and how will it inspire people to discover their potential?

Collegewise has changed a lot since 1999. New locations, new divisions, multiple owners with different goals and strategies to achieve them. But this vision, even if we didn't articulate it until 2018, is what we've always been since Kevin sat down at that first student's kitchen table in 1999. It's what makes us who we are today. And no matter what else may change, it's what we want Collegewise to be in the future—a place where environments are intentionally created to inspire everyone involved to discover their potential.

Culture, values, and unwritten rules

“Company culture” is an employer buzz phrase these days. Companies tout it, they write mission statements about it, they emblazon it on banners, etc. That’s all great when the idealized descriptions match the real actions. But if a company talks about one culture and then lives a very different one, the words are like those recorded reassurances of, “Your call is very important to us.” They promise things will be great, but before long, it’s clear you’ve been placed in an eternally hellish world of unimportance and holding. We try hard to avoid this mistake.

Some parts of our culture are timeless principles we’ve lived since day one. Other parts have created themselves based on what we actually do every day. And some of these are previously unwritten rules that we should have taken the time to explain. Written or unwritten, each of these principles helps make Collegewise Collegewise, and you shouldn’t have to learn any of them by osmosis.

Bring your heart to work. We treat our work like a calling. We want to go home at the end of the day proud of the contributions we’ve made. Collegewise is not the most important part of our lives, so please don’t make it yours. But when we’re here, it’s more than just a job to us, and we want to make it count. We know that when we arrive at work each day, we never leave it at zero—we either make it a little better or a little worse. We want to make it a little better.

Do the right thing. It’s so simple, but so easy to lose sight of in a morass of policies and procedures. When in doubt, ask yourself what feels right. What’s fair? What would you do if this were your best friend or your partner? How would you want them to be treated in a similar situation? We all regularly rely on our judgment here. Seeking the right thing, not the easiest or most profitable thing, rarely lets us down. Sometimes doing the right thing means saying no. That’s OK. Whatever you decide, you can stand behind it when you genuinely feel like you’re doing the right thing. We trust you, and we’ll support you.

Dress code? Here's our dress code: use good judgment. Instances where we've had to take someone to task for dressing inappropriately? Zero (although a strong argument could be made for Paul's flamboyant scarf phase). Most of us keep it casual without being too casual—no suits, but also no t-shirts, flip-flops, or jeans with distractingly large holes in them. When in doubt, keep it a little more professional when you're meeting with customers or otherwise out in front of the public. If you're nervous about making a fashion faux pas and want to see some specific examples, we do have an actual style guide you can access once you start working here. But really, good judgment will prevent almost all egregious style snafus.

Explain your out-of-office. We don't expect you to be reachable all day, every day. But if you're going to be unreachable for one day or longer during the workweek, please use your "out of office" reply and change your voicemail. That will keep your colleagues and your customers from wondering where you are. Also, it's not a hard-and-fast rule, but Wisers generally avoid standard out of office replies like, "I will be out of the office until March 6 and will have limited access to email." We actually tell people where we are, using human speak, not banal business lingo. We consider it an opportunity to pleasantly surprise people with honesty, personality, and even a little oomph.

Examples of auto replies we might use:

- *I'm visiting my family on the East Coast all week and dragging my husband to visit at least four colleges.*
- *I'll be at an admissions conference in Baltimore until Thursday, where I'm also presenting a session on how to help kids write stronger college essays.*
- *I'm camping with my kids for three days this week and pretending that I'm comfortable in nature.*

Example of an auto reply we would not use:

- *I am out of the office indefinitely undergoing intensive court-ordered psychotherapy.*

Don't agonize over your auto reply. It's OK if you don't want to be clever or if you'd just rather not tell every emailer where you are and what you're doing. Just be yourself and rest assured that any effort you make to avoid the standard language will be applauded by your colleagues.

Lean into the learning. We're a little intolerant of intellectual laziness on the job here. Nobody cares what your high school GPA or test scores were, and we don't expect you'll do physics for fun on Saturday nights. But successful Wisers know there's always more to learn about how to do great work in their jobs. They're always looking for information, tips, or other insights that can make them that much better. We notice if you pay attention and take notes during training. We notice if you actively show up to webinars, advanced trainings, or any other Collegewise offerings that could make you even smarter and better at what you do. We don't expect you to know everything. We expect that you won't behave as if you already know enough.

Make the rest of us better. We love people who are ambitious and want to be successful in their jobs. But a big part of being successful here means bringing other people along for the ride. All day, every day, you'll hear Wisers raving about the colleague who pitched in to help them out, or answered their questions, or otherwise took the time to be generous with time, knowledge, and energy when they didn't have to be. That's why our performance reviews, awards, and even promotion decisions always look at your contributions to others and to Collegewise in addition to your individual achievements.

Spread the wealth of information. We make our living helping people who can afford to pay us, and we feel a responsibility to give back to the many members of the college-going community who cannot. Downloadable guidelines, webinars, blogs—we put a lot of free material out there in the universe for anyone who wants it. We'll do a free seminar at any geographically reachable high school that asks, even if we're unlikely to enroll one of their students. And many of

our counselors also volunteer at programs to help under-resourced students with the college application process. There's always a lot more we can and should do in these areas, but we try every day to make sure we're living these values and not just talking about them.

We also support our employees' involvement in non-profit organizations, college-related or otherwise. If volunteer commitments mean you need to leave early or even miss a day of work for training programs, that's fine. Just run it by your manager and make sure your work and your team here don't suffer. We'll do our best to support you while you're supporting others.

Take initiative. You won't have to run every idea or suggestion by a committee of managers to get it approved. We'd rather have 100, not 10, Wisers actively finding ways to make us better every day. So if you have an idea you'd like to try, take steps to make it happen. See a problem that needs fixing? Take a shot at making it better. Really, this is what we expect of you. It's called taking initiative for a reason—nobody gives it to you. And you won't get ahead here by proving you can follow explicit directions better than anyone else. It can take some time to feel comfortable with this much freedom. In fact, it's natural during your early Collegewise days to say, "Please tell me what to do." But our goal is for you to eventually be a Wiser who says, "Here's what I've been doing."

R-E-S-P-E-C-T. Let's all be nice to each other. That doesn't mean we all need to get along all the time. We want you to speak your mind, and sometimes the best breakthroughs come after a good, passionate debate. Just be respectful. Be honest. If you get it wrong, apologize. Simple? Yes. But it makes for a much happier and more successful work environment.

Timeliness is Wise. Be on time. To everything. Don't leave a family waiting in your office or on a Zoom call because there was "so much traffic." Don't roll in five minutes late to a meeting with your team because the line at the coffee

shop was too long. If you struggle with punctuality, here's a system: (1) consider what you would do if there were a million-dollar cash prize at stake based on your on-time arrival; (2) whatever you answered for #1, do that.

What's the desired outcome? Whether we're redesigning our website, setting expectations for a new employee, or deciding what to present when we're invited to speak at a high school, we start with, "What's the desired outcome?" That question orients us. What are we trying to get done? How will we know if it worked? We love our processes at Collegewise, but focusing on the desired outcome prevents us from getting bogged down in the process itself rather than what we've accomplished at the end of it. And it invites multiple perspectives on how to best get there. This is not our version of "the end always justifies the means" (it doesn't). But identifying the desired outcome keeps all of us focused on what matters.

We don't count hours here. Sometimes we work Saturdays. Sometimes we work evenings. We all accept some reasonable degree of this, and we do it without complaining. But this goes both ways. We don't count hours off, either. We don't sweat a hard worker who just wants to go to a barbecue festival or Burning Man or a yoga retreat (all real examples from real Collegewisers). We don't expect you to be responding to calls and emails while you play with your kids, have dinner with your partner, or watch really bad reality television. Work does not own that time. So give us your all when you're on, including when it requires that you occasionally go outside of regular hours. Then stop and do something else. There's no need to be too focused on hourly totals when your work, life, and the balance between them doesn't suffer.

Words matter. If you're about to send an email that reads, "Attached, please find the attached attachment," start over. How you write, what you say, how you communicate—your words represent you and us. We don't expect you to write like Hemingway or speak like Churchill. But we do expect you to be clear, thoughtful, and respectful. Don't use jargon.

Don't send out typo-ridden emails that make no sense. Just talk and write like a human who wants to communicate with a fellow human.

Who does what?

We want you to know who can best help you when you've got a question or an issue. It shouldn't be a guessing game. That person will frequently be your manager, but at the same time, just about everyone at Collegewise is approachable and willing to point you in the right direction. If you have a question, you're probably not the first. So please don't be reluctant to speak up.

To give you an even clearer picture of who does what, here's some more information about our leadership and our teams.

Executive Team

We call our executive team APJECK because (1) it's an acronym that uses our first names, and (2) we couldn't think of anything clever. Here they are, in acronym letter order.



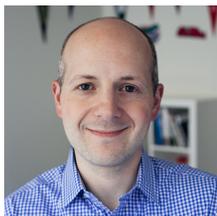
Arun Ponnusamy, Chief Academic Officer

As Chief Academic Officer, Arun is our resident college admissions expert, especially around highly selective college admissions (in 2017, he earned the unofficial Collegewise award for “Most Likely to Drop Knowledge”). He works closely with our Talent Department to recruit, train, and mentor new counselors, and he’s a featured speaker at marketing events and conferences.



Paul Kanarek, Head of Business Development

Paul, along with Joel, was the architect of our sale to Verlinvest in 2017. At the close of that sale, Paul stepped from the CEO role to that of Head of Business Development to help us find the best way to work through all the new challenges in front of us. He meets with the leadership of companies to help them see the wisdom of partnering with or selling their businesses to Collegewise, trains and mentors individual Wisers, and spends a good deal of time on stage in front of both Southern California and even international audiences.



Joel Block, Chief Executive Officer

Joel spends much of his time working with the executive team to set the direction of our company, making sure we hit our goals, and reporting our progress to Verlinvest’s leadership. If you get an unexpected phone call from Joel, don’t panic; Joel spends a good chunk of every day reaching out

to Wisers to offer advice on situations you might be facing or even just to ask your opinion about an idea we're considering.



Elizabeth Waite, Chief Marketing Officer

Elizabeth is responsible for all marketing and sales initiatives at Collegewise. She sets our strategy around advertising and social media, she built our first sales team, and she works closely with leadership to find the best ways for us to grow both domestically and internationally.



Chelsea Block, Chief Operating Officer

Chelsea is responsible for the performance and success of all our domestic offices. She works closely with our leadership around management, budgeting, best counseling practices, and marketing initiatives. A “Collegewise Counselor Cum Laude” (an internal distinction for Wisers eligible to train new counselors), Chelsea was also the 2016 recipient of our annual “Collegewise Counselor of the Year” award.



Kevin McMullin, Founder & Head of Talent

Kevin founded Collegewise in 1999, did all the counseling himself for the first 18 months, and served as our president through our sale to Verinvest in 2017. In 2018, he created our Talent Department with Allison Lopour. As our resident teacher and preacher around who we are, what we stand for, and how we do things, Kevin’s unofficial title could well be “Culture Officer” (which he acknowledges sounds like a fun but not quite real job).

Marketing and Sales

Our marketing department brings us together with potential Collegewise families. Our sales team, headed by Evan Fletcher, is increasingly the first point of contact for those families.

Finance

Brendan Suggett, our Director of Finance and resident Excel wizard, makes sure that we always have the most accurate, up-to-date information about our company's financial performance. Along with our bookkeeper, Olivia Vail, they also handle all our payroll, expense management, bookkeeping, and other financial responsibilities that come with a company of our growing size.

Talent

Allison Lopour and the aforementioned Kevin head our Talent Department and are responsible for finding the very best people to join Collegewise, training them once they arrive, and helping all Wisers do the best work of their careers. They also double as our version of a human resources department, but they never use that truly awful phrase (humans are not *resources*).

Making a career

We're proud to look around and see how many people at Collegewise are enjoying what are increasingly long and successful rides here. But that also puts a great deal of responsibility on the company and the managers to keep Collegewise a place where even the most successful people can keep growing in their careers. Most discussions of your career progress will take place between you and your manager. But this section will give you an overview of how we treat career paths and progress at Collegewise.

No ladders, no maps

Every successful employee at Collegewise wants and deserves to progress. But we don't have a defined corporate ladder that everyone must climb to get ahead. Corporate ladders reward someone for thriving in one role by promoting them out of it. For some of you, career progression at Collegewise might mean moving to a role with more responsibility and influence. But for others, it could mean achieving a level of mastery within your current role. We try hard to value both equally, and to lay out potential career paths within each.

We also don't have a pre-drawn map to getting ahead. Promising someone that they will progress to the next more desirable role after they work here for x number of years, hit these objectives, pass that test, ace an interview, or complete a certification might sound good in theory. But in practice, it rewards the people who can follow instructions more than it does the people who thrive in their roles. We want you to know what's expected of you, how you're being measured, how we define greatness, and what opportunities will be available to you. Then we'll get out of your way and let you and your manager chart your course.

How do we measure greatness here?

Every role at Collegewise and every Wiser within those roles will have different goals that define success on the job. But whether you're a counselor, a manager, a marketer, or an administrative assistant, there are three categories we apply broadly when defining what greatness looks like. These are far from exhaustive descriptions, and you shouldn't try to use them like a checklist. But they should help you and your manager have more informed conversations around your progress at Collegewise.

1. What can you tackle independently?

Someone new to a role might need to have their work reviewed with substantial back-and-forths before it reaches the customer or otherwise goes live. Someone more advanced can tackle a larger volume and wider scope of work independently, with little or no need for review. And someone who's mastered the work can set and direct an entire department because they just know the most about that area.

2. How good is your work?

A new Wiser might have the basic protocols down from training, but still have occasional issues executing them day to day. Someone more experienced can deliver consistent quality on the job and will eventually be able to give feedback to less experienced people in the same role. And the most advanced Wisers can train new and experienced colleagues, or even help roll out new approaches or systems in their area of expertise.

3. What are your overall contributions to Collegewise?

What's the overall impact that you make at Collegewise? Newer Wisers might need some time just to learn how to do their own job well. But eventually as they progress, they learn more about topics that help them produce even better work in a variety of areas. More advanced Wisers can help set standards for an entire department. They can invent

new concepts and push our company forward. And those who've mastered their craft might be recognized in their industry for their contributions to the profession.

Working with your manager

Great managers are a combination of coach and agent. They make sure you know what's expected of you and that you have what you need to do your job. They give you regular feedback so you don't have to wonder whether you're performing well. They're invested in your career and want to see you progress in a way that's professionally and emotionally rewarding for you. And they should be looking for opportunities to help you learn and grow so you feel like you're making progress all the time. Management is an art, and no two great managers do it identically. But here are three things we train and expect your manager to do to help you be happy and successful at Collegewise. We've described them here not just so you know what you can expect, but also so you can begin thinking about how your manager can best support you.

1. Define the right outcomes, not the right steps.

Your manager will work with you to set appropriate goals in your job. But they won't legislate every step you should take to achieve them. We want you to use your unique combination of talents, strengths, and insights to reach those goals. So we'll tell you where we enforce some standards and conformity. Then we'll invite you to find your own steps to achieve the outcomes.

2. Focus on your strengths.

Strengths improve more than weaknesses do. Unless you have a hole in your game that fundamentally impacts your job, your manager won't spend too much time trying to change you. Instead, let's look for ways for you to make the most of who you already are.

3. Help you find the right fit.

Your manager should help you identify the roles, projects, or teams at Collegewise where you'll have the opportunity to do what you do best every single day. And the beauty of having multiple paths of progression is that it gives you and your manager more options for finding great fits.

Performance management

We do formal performance reviews once a year, usually in January. The point of these reviews is not for your manager to finally decide to tell you what you've done well and where you need to improve—that feedback should be happening on a regular basis. Instead, expect to spend a little time reviewing your work so we can learn together about your strengths and your successes, and a lot of time planning your goals and future career path.

We also do informal reviews once a year, usually in June. They compare your progress with the goals you set with your manager at your annual review, and give you both a chance to learn or even make course corrections if you need to.

Most importantly, we expect your managers to give you regular feedback and coaching. We're not looking to annoy you, and nobody wants a manager standing over them observing their work all day. But it's not fair to withhold that feedback and then finally reveal it at an annual performance review. Job performance is not an annual episodic event, like the Oscars or cleaning out your garage. It happens all the time, and the feedback should do the same.

When it's time to move on

Not everyone will decide to become a Collegewise lifer. If what was right for you at one point in your career—the job, the company, or even the profession itself—has changed over time, it's normal and healthy to acknowledge it. If you

come to the conclusion that it's time to move on from Collegewise, please try not to spring it on us with the typical two-weeks' notice. Instead, we invite you to be honest and tell us when you're ready to start looking elsewhere. Give us as much notice as you can and offer to help with the transition while we find the next Wisers to step in. In return, we promise to thank you and to treat you with the respect you deserve for being so open with us. And if you'd like, we'll pitch in with advice, references, or other assistance to help you get where you want to go. This mutual consideration between Collegewise and departing employees has always worked well for both parties here. We've even had a few great Wisers leave and decide later to return—and we were thrilled to welcome them home! So, if you decide that your run at Collegewise is coming to a close, let's commit together to ending on the same great terms we've enjoyed during your stay.

Benefits and perks

Since the majority of Collegewise employees work (1) full time and (2) in the US, this section is written with those as the defaults. For part-time Wisers and those outside of the US, we'll have individual discussions with you about appropriate benefits and how to take advantage of them.

Time on and off

Holidays

Here are the holidays we close the offices for every year:

- New Year's Day (January 1)
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving
- Winter holiday break (starts right before Christmas and ends just after New Year's Day).

We also publish an annual [holiday schedule](#) with specific dates.

We don't typically close our offices for Presidents', Veterans, and MLK Day, not because we don't appreciate what they celebrate, but because they're often great days to meet with students and their families. You could still opt to take one of those days off—we care more about the quality of your work than we do the specific days when you're at work. Just run those choices by your manager to make sure they work for your office or your team.

Summer Fridays

During the summers, we close on Fridays at 1 p.m. Our regular business hours shift to Monday-Thursday from 9 a.m. to 6 p.m., and Fridays from 9 a.m. to 1 p.m. At the beginning of each summer, we'll designate on which 10-11 Fridays we will close early. Summer Fridays are not transferable, and we don't accrue Summer Fridays. Much like French fries, it's best to use up Summer Fridays when they're served.

Vacation days, sick days, and personal days

Overachievers are great, but workaholics are not. Regular time off is critical to doing our best work and to our longevity here. That's why we don't specify the precise number of days when you're allowed to go on vacation, be sick, or just take a day off to do something else. We think that people who do great work should be able to take a vacation, hang out with Mom when she comes to visit, and stay at home and throw up in peace when the stomach flu strikes.

Work hard, do a great job, and when you need time off, take time off. If you don't take time off, expect a work-life balance intervention. That's our policy.

Can we be a little more specific?

Sure. Here's a little more information just to clarify the letter and spirit of our time off policies.

We get ten days of vacation per calendar year. By vacation days, we mean those days when you're completely checked out—your auto-reply is on, your voicemail says that you're away, and no one should expect to reach you with a quick question. But the spirit of that law is that we're not keeping a running tally of your vacation days. So try to keep it around 10 days. Just don't let your work suffer or abuse the privilege.

We also get one week off at the end of December (our holiday break) that is not counted at all in your vacation time.

We get an additional “floating week” of time off that does not count against your vacation and can be used whenever you’d like as long as your manager approves it.

For many people at Collegewise, September - November is not an ideal time to take an extended vacation (five days would be extended). An occasional Friday off to enjoy a long weekend somewhere is fine and certainly well-deserved. But the fall is our busiest season because our seniors are working on their applications. This isn’t a hard-and-fast rule, and some particularly responsible planners have pulled it off. But this is one of those things we put in an employee handbook so a new member of the family doesn’t inadvertently book a weeklong vacation in October because nobody bothered to explain the potential challenges.

States have their own laws around sick days, so you will accrue them based on what your state decides. But again, we’re not keeping a running tally of how many days you had the Ebola virus. Get to a doctor and stay home until you (and we) are safe again.

For people who’ve previously worked in places where you knew exactly how many sick, personal, and vacation days you received each year, this can be a bit of an adjustment. But we think our version gives you more scheduling freedom and more time off in exchange for doing great work.

Personal, medical, and bereavement leave

We understand that life happens. When it happens to you and you might need some time off, speak with your manager and we can figure out a plan that works for everyone.

Parental leave

When you welcome a new child (birth or adopted), Collegewise encourages parents, spouses and partners—regardless of gender or primary caregiver status—to take up to 6 weeks paid leave. We also encourage birthing parents to take an additional paid medical leave of up to 6 weeks.

Health insurance

Our medical benefits are currently a PPO through United Healthcare, and there are two plan levels to choose from. For dental, we use Principal's Network, and vision is through the VSP network (but administered through Principal). If you choose to participate in our insurance plan, we'll connect you with our benefits broker, Cathy Waite, directly. She'll help you handle the paperwork and answer any questions that you have. Your medical/dental/vision benefits kick in on the 1st of the month following your date of hire. Example: If your date of hire is March 15, your benefits will start on April 1.

401(k) Retirement Plan

New employees are eligible for our 401(k) plan after 12 months of employment and 1,000 hours worked. Collegewise will match 33% of each \$1 up to 5% of a paycheck. For example:

- If your paycheck is \$1,000 and you defer 5% (\$50) to the 401(k), Collegewise matches \$16.66 (33% of the \$50).
- If your paycheck is \$1,000 and you defer 10% (\$100) to the traditional 401(k), Collegewise matches \$16.66 (33% of the \$100).

We use Sharebuilder 401(k).com to administer our plan and have several investment options available. Around the time you become eligible, Olivia from finance will reach out to you with an invitation to enroll in the program. If you're interested, she'll set you up with access to the website.

Professional Development (PD)

We want to help you satisfy that urge to get even better at something that matters. So we offer professional development (PD) to new employees, experienced Wisers, counselors, managers, and everyone in between in the form of live classes, webinars, and written material. Almost all those opportunities are open to anyone who wants to attend, even if the subject matter technically falls outside the scope of your job. We also support external PD opportunities where a Wisener goes elsewhere to learn, often with a cost associated. We created an internal guide to professional development that shares examples, the process for getting external PD approved, and some advice for making it worth your while. You can locate it on our SharePoint system, or your manager can help unearth it for you.

Let's get real: the not-so-great parts of Collegewise

We're very proud of what we've created at Collegewise. But we're not perfect. We make mistakes, we get it wrong, and sometimes our walk doesn't match our talk. Here are a few parts of Collegewise that are not so great, or that still need to be addressed. We're sharing them here because it's important to be honest. And because we hope that by pointing these out right from the start, you'll be better prepared to face—and to help us address—them.

Is everyone here smart/clever/engaging, etc.? Many Wisers admit to feeling intimidated when they first arrived here, like a freshman at Harvard who looks around on day one and concludes that Harvard admissions has made a terrible mistake. That's not a welcoming vibe. Yes, our people are some of the best you will find anywhere in our industry. But guess what? So are you. We are exceptionally good at recruiting and selecting talent. You are not here by accident. So don't worry about fitting in or proving yourself. You made it. You're here. You're one of us. Like those kids at Harvard, you'll settle in and find your place. And once you do, please help the next newbie feel the same way a little faster.

We're still a work in progress. Change never seems to go away at Collegewise. New ownership, new programs, new policies—we've asked our people to get comfortable with the uncomfortable a lot more often than they'd need to if they worked at a company or a school that's been around forever. This change is not instability or a lack of direction—we know exactly where we're headed. But getting there often means the way we did things yesterday won't always work tomorrow. And there's no getting around the way even good change creates discomfort during the transformation.

Clique much? Collegewise can feel cliquy at times. While this is especially true if your work and attitude prove you don't care about doing great work as much as the rest of us do, there's still a lot of camaraderie and bonding happening with different groups throughout Collegewise. It's easy when you're new to feel like an outsider who will never be an insider. But please don't change who you are to fit in here. This is not junior high where cliques are predicated on establishing who's in and who's out. Our cliques are more like the college versions that form precisely *because* everyone here is different and we don't all connect with everyone else in the same way. Just give it time. You'll find your place here, and your group if you want one. Until then, just work hard and be yourself. And if you see a project, team, or other opportunity you'd like to join, please raise your hand (figuratively). Much like when you were in college, the best way to get involved is to just start.

The customer is not always right. If you interact regularly with customers, especially as a counselor, you'll find that some families are more difficult to please than others. That's part of the job. But in the worst cases, they'll be unreasonable and might even yell at you for things that are not your fault. It doesn't happen often, but when it does, it can weigh on you. Great Collegewise counselors feel a deep sense of personal responsibility for their families—that means you're doing something right. It also means it's nearly impossible to detach from that feeling even when a family is venting without cause. If you make a mistake and let someone down, you need to own it and fix it. But if a customer decides that you're the appropriate receptacle for their unrelated issues, you'll need to find the balance between addressing it professionally and not taking it personally. Start by reminding yourself that it's not about you. Kickboxing takes the edge off nicely, too.

We're for profit. We profess a commitment to doing our part to keep the college playing field level. But while we do a lot compared to other companies in our industry, many of us feel that we don't do enough. It's sometimes difficult to reconcile our values with our realities. We're not a non-profit operating on donations and volunteers. We're a

company operating on sales and paid employees. And the only way companies like ours get to keep doing what we do is to make money. Sometimes our balance of helping those in need and those with money feels out of whack. We've got big dreams to address this more formally in the future. But for now, we know we've got more work to do.

The burnout risk is real. Yes, we love our jobs. We love our company. We're wonderfully passionate and engaged. But don't forget that this is still just a job—that's all. Workaholism isn't a proxy for great work. It's just a combination of bad focus and bad boundaries. So please don't take your engagement to levels where you burn out. Bring your effort, heart, and generosity to work. Then shut work off, go home, and play with your dog, kids, Xbox, etc.

Anti-harassment policy

Everyone deserves to feel safe at work and to be treated with respect by our co-workers, supervisors, and even our customers. While any collection of diverse and differing humans won't get along perfectly all the time, certain types of mistreatment are against the law. In many cases, the laws are even more specific for members of certain protected classes. Unless these basic protections are understood, honored, and respected, Collegewise cannot be an environment where everyone feels empowered to reach their full potential. That's why we've put this material together.

The subjects and the legal formality within this portion are meant to keep us in compliance with federal and state employment laws. But this is bigger than just doing what we're told. The world has shown all of us how pervasive harassment really is. To assume it would never happen here, to refuse to educate ourselves, or to pretend that we're somehow insulated in perpetuity from those ugly realities would be naïve and negligent. We need to be better—and wiser—than that.

To protect ourselves and each other from harassing behavior, we must understand the laws, our rights as employees, and the appropriate actions to take if we witness or experience unacceptable behavior. Let's work together to keep Collegewise the safe, respectful work environment we all deserve.

We hope this material will help all of us be agents of responsible behavior, fair treatment, and positive change at work.

The Collegewise Anti-Harassment Policy

Collegewise is committed to fostering a work environment in which people are treated with dignity, decency, and respect. Our workplace must be free of intimidation, oppression, and exploitation. As part of our commitment to educating and protecting our employees, Collegewise will not tolerate unlawful discrimination or harassment of any kind. We will enforce this policy and seek to prevent, correct, and discipline behavior that violates it.

Every employee at Collegewise, regardless of position, is expected to comply with our anti-harassment policy and to take appropriate measures to ensure that prohibited conduct does not occur.

Appropriate disciplinary action will be taken against any employee who violates this policy. Based on the seriousness of the offense, disciplinary action may include verbal or written reprimand, suspension, or termination of employment.

Managers and supervisors who knowingly allow or tolerate discrimination, harassment, or retaliation, including the failure to immediately report such misconduct to our Talent Department (HR), are in violation of this policy and subject to discipline.

Prohibited Conduct Under This Policy

To ensure that our employees enjoy the protections defined by all applicable federal, state, and local anti-discrimination and harassment laws and regulations, Collegewise enforces this policy in accordance with the following definitions and guidelines:

- Verbal harassment includes comments that are offensive or unwelcome regarding a person's national origin, race, color, religion, gender, sexual orientation, age, body, disability, or appearance, including epithets, slurs, and negative stereotyping.
- Nonverbal harassment includes distribution, display, or discussion of any written or graphic material that ridicules, denigrates, insults, belittles, or shows hostility, aversion, or disrespect toward an individual or group because of national origin, race, color, religion, age, gender, sexual orientation, pregnancy, appearance, disability, sexual identity, marital status, or other protected status.

Sexual Harassment

Sexual harassment is a form of unlawful employment discrimination under Title VII of the Civil Rights Act of 1964 and is prohibited under Collegewise's anti-harassment policy. According to the Equal Employment Opportunity Commission (EEOC), sexual harassment is defined as "unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when submission to or rejection of such conduct is used as the basis for employment decisions or such conduct has the purpose or effect of creating an intimidating, hostile, or offensive working environment."

Sexual harassment occurs when unsolicited and unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature:

- Is made explicitly or implicitly a term or condition of employment.
- Is used as a basis for an employment decision.

- Unreasonably interferes with an employee's work performance or creates an intimidating, hostile, or otherwise offensive environment.
- Sexual harassment may take different forms. The following examples of sexual harassment are intended to be guidelines and are not exclusive when determining whether there has been a violation of this policy:
- Verbal sexual harassment includes innuendoes, suggestive comments, jokes of a sexual nature, sexual propositions, lewd remarks, and threats; requests for any type of sexual favor (this includes repeated, unwelcome requests for dates); and verbal abuse or "kidding" that is oriented toward a prohibitive form of harassment, including that which is sexual in nature and unwelcome.
- Nonverbal sexual harassment includes the distribution, display, or discussion of any written or graphic material, including calendars, posters, and cartoons that are sexually suggestive or show hostility toward an individual or group because of sex; suggestive or insulting sounds; leering; staring; whistling; obscene gestures; content in letters, notes, facsimiles, e-mails, photos, text messages, tweets, and Internet postings; or other forms of communication that are sexual in nature and offensive.
- Physical sexual harassment includes unwelcome, unwanted physical contact, including touching, tickling, pinching, patting, brushing up against, hugging, cornering, kissing, fondling, and forced sexual intercourse or assault.

- Courteous, mutually respectful, pleasant, noncoercive interactions between employees that are appropriate in the workplace and acceptable to and welcomed by both parties are not considered to be harassment, including sexual harassment.

Consensual Romantic or Sexual Relationships

Collegewise strongly discourages romantic or sexual relationships between a manager or other supervisory employee and his or her staff (an employee who reports directly or indirectly to that person) because such relationships tend to create compromising conflicts of interest or the appearance of such conflicts. In addition, such a relationship may give rise to the perception by others that there is favoritism or bias in employment decisions affecting the staff employee. Moreover, given the uneven balance of power within such relationships, consent by the staff member is suspect and may be viewed by others, or at a later date by the staff member, as having been given as the result of coercion or intimidation. The atmosphere created by such appearances of bias, favoritism, intimidation, coercion, or exploitation undermines the spirit of trust and mutual respect that is essential to a healthy work environment.

Retaliation

No hardship, loss, benefit, or penalty may be imposed on an employee in response to:

- Filing or responding to a bona fide complaint of discrimination or harassment.
- Appearing as a witness in the investigation of a complaint.
- Serving as an investigator of a complaint.
- Lodging a bona fide complaint will in no way be used against the employee or have an adverse impact on the individual's employment status. However, filing groundless or malicious complaints is an abuse of this policy

and will be treated as a violation. Any person who is found to have violated this aspect of the policy will be subject to discipline up to and including termination of employment.

Confidentiality

All complaints and investigations are treated confidentially to the extent possible, and information is disclosed strictly on a need-to-know basis. The identity of the complainant is usually revealed during the investigation to the parties involved and to the Talent Department. Collegewise will take adequate steps to ensure that the complainant is protected from retaliation during and after the investigation. All information pertaining to a complaint or investigation under this policy will be maintained in secure files within the Talent Department.

Complaint Procedure

Collegewise has established the following procedure for lodging a complaint of harassment, discrimination, or retaliation. The company will treat all aspects of the procedure confidentially to the extent reasonably possible.

An employee who believes that they are the object of harassment or discrimination on any prohibited basis, or who has observed such harassment or discrimination, should report the incident, preferably in writing, as soon as possible after the incident has occurred. Reports should be submitted to a senior member of the Talent Department listed below.

Allison Lopour
Executive Director of Talent
(949) 354-6742
allison@collegewise.com

Kevin McMullin
Head of Talent
(949) 235-7421
kevinm@collegewise.com

If Allison and Kevin are unavailable, or if the employee believes it would be inappropriate to contact a member of the Talent Department, they should immediately contact their supervisor.

The Talent Department will initiate an investigation to determine whether there is a reasonable basis for believing that the alleged violation of this policy occurred.

Retaliation against an employee who complains of harassment or discrimination, who files a claim of harassment or discrimination, or who participates in an investigation related to harassment or discrimination is strictly prohibited.

If it is determined that a violation of this policy has occurred, the Talent Department will recommend appropriate disciplinary action. The appropriate action will depend on the following factors:

- the severity, frequency and pervasiveness of the conduct;
- prior complaints made by the complainant;
- prior complaints made against the respondent; and
- the quality of the evidence (e.g., firsthand knowledge, credible corroboration).

If the investigation is inconclusive or if it is determined that there has been no violation of policy but potentially problematic conduct may have occurred, the Talent Department may recommend appropriate preventive action.

Alternative Legal Remedies

Nothing in this policy may prevent the complainant or the respondent from pursuing formal legal remedies or resolution through local, state, or federal agencies or the courts.

Please sign Signature Page to acknowledge receipt and understanding of this policy.