

Pilot Project – Staff Development

Fund Application and Reimbursement Process

(Revised May 2018)

Step 1 Discuss your professional development plans and the potential support from school funds to support those plans with your principal/DU administrator. Complete any related documentation or process as required.

Step 2 Should you have the need to access additional funds to support your participation in the chosen professional development activity, you may wish to submit an application for funding from the Staff Development Fund. Review the Staff Development Fund Guidelines carefully.

Step 3 Download, complete and submit the Individual or Group Funding Application Form and supporting documents (as outlined in Guidelines 3.2 and 3.3) to sdf@edpub.org or by fax to 780-453-1407; Attention: Staff Development Fund Administrator.

Step 4 Within 45 days of the completion of the professional development activity, complete and submit an Expense Claim form and the required receipts to ATA Local 37, 401, 11010-142 Street, Edmonton, AB T5N 2R1; Attention: Staff Development Fund Administrator.

EDMONTON PUBLIC TEACHERS, LOCAL 37
ALBERTA TEACHERS' ASSOCIATION
AND
EDMONTON PUBLIC SCHOOL BOARD
STAFF DEVELOPMENT FUND GUIDELINES FOR TEACHERS
Revised May 2018

1. PURPOSE

As per the Collective Agreement between the Board of Trustees of the Edmonton Public School Board and The Alberta Teachers' Association, Local 37, this Fund is available for the professional development of teachers or groups of teachers. The function of the Fund is to assist individuals or groups of teachers in pursuing professional development activities focused on teaching quality and improvement of student outcomes. Funding may support costs related to courses, workshops or conferences, online courses, books, interschool visitation, collaboration or practical research, related substitute teacher coverage or any other professional development activities which the teacher believes meet a professional growth need. **It is not intended that the Staff Development Fund be used for payment of fees for courses or activities whose primary focus is personal development, or for extra-curricular activities. Items or activities that will incur a taxable benefit will not be covered by the fund.** Books must be a single copy for teacher use only unless it is used as a professional book study among a group of teachers where multiple books can be ordered under the group fund. These items or activities are determined in consultation with Canada Revenue Agency guidelines.

2. FUND ALLOCATION

Edmonton Public Schools will provide an amount of \$750,000 in 2017–2018 and 2018–2019 and \$875,000 in 2019–2020. The annual amount will be provided in two equal installments to Edmonton Public Teachers Local 37 of the ATA. The first amount will be provided during the first week of September and the second amount during the first business week in January. Any unallocated funds in the Staff Development Fund will be returned to Edmonton Public Schools at the conclusion of the pilot.

3. APPLICATION FUNDING PROCESS (Individual/Group)

The annual fund allocation will be divided into two equal portions: the first portion will be allocated for professional development activities that take place between the first operational day of the school year and January 31 of that school year, and the second portion will be for professional development activities that take place from February 1 of the school year until the last operational day of that school year. The fund will be administered on a first come, first served basis.

The approval process for professional development activities beginning on the first operational day of each of the three school years will begin in June of the preceding school year. Note, the Local office is closed in July and August. Any application received after the last operational day will be held until the new school year resumes, and processed in the order in which it was received.

The approval process for professional development activities beginning February 1 of each of the three school years will begin on the first operational day in January of that school year. Should the funds available for the first term not be fully committed, applications for support for professional development activities scheduled to take place in the second half of the school year may be pre-approved. The activity must be completed by August 31 of the school year in which the application for funding was approved.

Applications must be in compliance with these guidelines and related to personal “out-of-pocket” expenses only to be considered for funding. The receipt of a complete application will be confirmed via email.

- 3.1 Any individual employed at the time of the planned activity and governed by the terms of the ATA/EPsB Collective Agreement may receive approval for support under the terms of these guidelines.
- 3.2 Application forms may be obtained from the Edmonton Public Teachers website (<http://local37.teachers.ab.ca/Pages/Home.aspx>) or from the Edmonton Public Schools website (Connect.epsb.ca, search “Staff Development Fund”).
- 3.3 Applications must be accompanied by supporting documentation such as a conference brochure, pamphlet, information from course calendars, or printed website information that includes a description of the activity, duration, location and related costs.
- 3.4 Applications for activities that require travel outside of the province must be accompanied by a copy of the appropriate completed Out of Province Professional Development Request for Approval form (Connect.epsb.ca, search “Staff Development Fund”).
- 3.5 Applications are not considered received until all required documentation is received and complete.
- 3.6 Applicants requesting funding as a presenter must also be registered for the activity.
- 3.7 Applicants are responsible for ensuring their application is received in a timely manner. Applications must be received by the Staff Development Fund Administration office not less than two (2) weeks prior to the activity.
- 3.8 No consideration for funding will be given to applications received after the activity has commenced.
- 3.9 Applications with a total request for less than \$50 will not be considered.
- 3.10 Applications for funding support will be reviewed by the Staff Development Fund Administrator. An approved request for funds does not constitute approval by a supervisor for participation in a professional development activity. Approval of participation in a professional development activity by a supervisor does not constitute approval of an application to the Staff Development Fund.
- 3.11 The redistribution of any carryover funds will be determined by the members of the Staff Development Fund Joint Committee.

4. APPLICATION FOR INDIVIDUAL FUNDING

- 4.1 A maximum of 60% from this fund will be allocated for individual applications.
- 4.2 Applications must be completed by the individual applying for funding. Approved applications are for a specified activity and are not transferable.
- 4.3 Individual teachers may be granted support to a maximum of \$1,800 within a consecutive two school year period.
- 4.4 Individuals cannot access group funding for the same event.

5. APPLICATION FOR GROUP FUNDING

- 5.1 A maximum of 40% from this fund will be allocated for group applications.
- 5.2 A group of teachers shall be eligible to apply for funding from the Staff Development Fund for collaborative professional development activities. For the purposes of these guidelines a group shall be defined as being comprised of two or more teachers. Individuals within such groups may be approved for group funding once in any school year.
- 5.3 Applications for group funding are to be completed and submitted by a group representative who will also be submitting the corresponding expense claim form.
- 5.4 Group funding will be limited to a maximum of \$1,000 per group member to a total maximum of \$5,000 per group.
- 5.5 Groups cannot access individual funding for the same event.

6. APPLICATION FROM SUBSTITUTE TEACHERS

- 6.1 Substitute teachers are eligible for funding under these guidelines, except for the costs of substitute coverage.
- 6.2 For applications from substitute teachers, active status will be verified with the Director, Human Resources Consulting.
- 6.3 If deactivated, a substitute teacher will forfeit the right to submit an application and/or the right to claim a reimbursement.

7. ELIGIBILITY OF FUNDS

- 7.1 For the purpose of determining eligibility, the school year is defined as the period beginning on the first day of operation and ending on the day prior to the first day of operation in the following year.
- 7.2 Eligibility does not guarantee funding.

8. ELIGIBLE EXPENSES AND EXPENSE CLAIMS

All expenses must be listed in Canadian dollars. Expenses paid in another currency must be accompanied by documentation indicating the exchange rate, as per the Bank of Canada, on the date that the expense was incurred. Please include receipts.

- 8.1 The following receipted personal “out-of-pocket” expenses (expenses paid by the applicant) are eligible for reimbursement:
- 8.1.1 Conference or activity fees (excluding membership fees).
 - 8.1.2 Travel expenses (if the activity is held outside of Edmonton). Approved applicants will be expected to travel by the most practical and economical means. Kilometrage will be paid at the Board approved rate (\$0.505 per kilometer).
 - 8.1.3 Car rental costs and fuel expenses related to the car rental agreement.
 - 8.1.4 Taxi/shuttle fares and parking costs (receipts required).
 - 8.1.5 Accommodation costs (if the activity is held outside of the greater Edmonton area). Where accommodation is shared, each participant may only claim a pro rata share of the total cost. Where a bill is shared, both names should appear on the bill.
 - 8.1.6 Meal costs (including tips) as outlined in the application and expense claim forms. To make a claim for actual meal expenses, itemized receipts must be attached. Charge card receipts will not be accepted. Costs associated with the purchase of liquor will not be reimbursed. Meals included as part of the registration fee for the professional development activity will not be eligible for the meal per diem.
 - 8.1.7 Air miles or other loyalty plan credits are not eligible expenses.
 - 8.1.8 Where Private Business Leave will be accessed to enable participation in the professional development activity, the deducted rate of pay for a substitute teacher may be claimed. (Teachers’ Collective Agreement, September 1, 2017 August 31, 2020). A copy of the approval of the Private Business Leave will be required.
 - 8.1.9 Where Personal Leave Unpaid will be accessed to enable participation in the professional development activity, claims for salary are not eligible for reimbursement.
 - 8.1.10 Funds to post-secondary institutions exclude U-pass, students’ union or other association fees, optional health plan fees, late fees or installment fees.
 - 8.1.11 Making a claim (T2202A) for amounts reimbursed for tuition fees through this fund is contrary to the Income Tax Act. Further information is available from the Canada Revenue Agency at <http://www.cra-arc.gc.ca/menu-eng.html>.

- 8.2 Proof of registration in approved activity must be provided with the Expense Report.
- 8.3 Receipted expenses must be submitted within forty-five (45) days from the date of the completion of the approved activity. No reimbursement of expenses will be made until completion of the activity. No reimbursement will be made for expenses received more than forty-five (45) days after completion of the approved activity.
- 8.4 The expense claim form needs to be completed in full and accompanied by all eligible receipts before a reimbursement will be processed.

9. INTERPRETATION OF GUIDELINES

Teachers wishing interpretation of the above guidelines should contact the Staff Development Fund Administrator through the office of Local 37, ATA (780-455-2164) or email sdf@edpub.org.

10. APPEAL PROCESS

10.1 Any teacher or group of teachers denied funding or an expense reimbursement from the Staff Development Fund shall be entitled to submit a written appeal of the decision of the Fund Administrator to the Staff Development Fund Appeal Committee through ATA, Local 37 at sdf@edpub.org attention Staff Development Fund Appeals.

10.2 The Appeal Committee will review the appeal in a timely manner and inform the appellant of the decision.

10.3 The decision of the Appeal Committee is final.

11. REVIEW OF GUIDELINES

These guidelines will be reviewed as required by the Staff Development Fund Advisory Committee. Any revisions to the guidelines will be announced prior to their implementation.

Joint Staff Development Fund Pilot Project - Application Checklist

(Revised May 2018)

- I/we have read the Staff Development Fund Guidelines for Teachers (Revised May 2018).
- I/we have discussed the PD plans and the potential support from school funds with the principal/DU administrator.
- I/we have downloaded and completed the correct application form (search Connect "Staff Development Fund Guidelines and Forms" or <http://local37.teachers.ab.ca/Salaries%20and%20Benefits/Pages/Staff-Development-Fund.aspx>).
- I/we have provided a copy of the PD activity/resource information that includes a description of the activity, duration, location and related costs (ie, conference brochure, course calendar) with the application.
- I/we have accessed, completed, and had the supervisor sign the Out-of-Province Professional Development form for any PD activity outside of Alberta and have included a copy with the application. (Search Connect "Out-of-Province Professional Development Request for Approval").
- I/we have submitted the complete application (with all required attachments) to the Local's office **at least two weeks prior** to the activity. No consideration for funding will be given to applications received after the activity has commenced.

Applications are not considered received until all required documentation is completed and received by the Local's office.

Funding from the Staff Development Fund is restricted to \$1,800 per individual over a two-year period (2017/18 and 2018/19) and one group PD activity per school year (see *guidelines for group maximums*).

Completed application forms are to be sent to the Local's office by fax (780-453-1407) or email (sdf@edpub.org).

Surname (Please Print)	Given Names (in full) underline name used	Status <input type="checkbox"/> Contract Teacher <input type="checkbox"/> Active Substitute Teacher
Division(s) Taught <input type="checkbox"/> Elementary <input type="checkbox"/> Junior High School <input type="checkbox"/> High School <input type="checkbox"/> Non-School Based	School/DU	School Phone Number
Email Address (Applicants will be notified by email once the application has been processed.)		Alternate Contact Number
Name of Activity	Date(s) of Activity	Location of Activity

Type of Activity/Resource (Attach details as outlined in the Staff Development Fund Guidelines)

- | | |
|--|---|
| <input type="checkbox"/> Course | <input type="checkbox"/> Interschool Visitation |
| <input type="checkbox"/> Workshop | <input type="checkbox"/> Collaboration |
| <input type="checkbox"/> Conference | <input type="checkbox"/> Practical Research |
| <input type="checkbox"/> Online Course | <input type="checkbox"/> Other (please specify) _____ |
| <input type="checkbox"/> Book | |

PROJECTED ELIGIBLE PERSONAL EXPENSES (See Staff Development Fund Guidelines)

Conference or Activity Fee/Course Fee/Resource Cost (excludes membership fee) \$ _____

Travel \$ _____

Taxi/Airport Shuttle/Bus/Parking \$ _____

Hotel Accommodation \$ _____

Meals per diem without receipts = \$47 CAD (\$10.00 breakfast; \$13.50 lunch; \$23.50 dinner) \$ _____

Substitute Teacher Required Yes No

If required, identify the source of funding:

- DU/school to pay (principal/supervisor authorized) *The Staff Development Fund will not reimburse
- Private Business Leave* at the substitute teacher rate of pay – \$218 for full day, \$132 for half day – requires an application to Leaves of Absence
- Personal Leave Unpaid – requires an application to Leaves of Absence

Total Substitute Costs related to Private Business Leave \$ _____
(All claims for substitute teacher costs will be subject to verification with Edmonton Public Schools.)

Total Projected Expenses \$ _____

AMOUNT REQUESTED (to a maximum of \$1,800 in a two year period) \$ _____

Signature of Applicant

Date

The personal information collected on this form will be used and disclosed solely for the purpose of processing this application and is collected under the authority of The School Act and Alberta's Freedom of Information and Protection of Privacy Act for the purpose(s) noted above. If you have any questions about this application, please call 780-455-2164.

Submit to: **ATA, LOCAL 37**
401, 11010 - 142 Street
Edmonton, AB T5N 2R1
Phone: 780-455-2164
Fax: 780-453-1407
Email: sdf@edpub.org

This section is to be completed by the Staff Development Fund Administrator.

Funding is: approved not approved \$ _____

Signature of Staff Development Fund Administrator Date

TO BE COMPLETED AND SUBMITTED BY THE REPRESENTATIVE FOR THE GROUP WHO WILL BE SUBMITTING THE EXPENSE CLAIM

Surname (Please print)	Given Names (in full) underline name used	Status <input type="checkbox"/> Contract Teacher <input type="checkbox"/> Active Substitute Teacher
School/DU		School Phone Number
Email Address (The group leader will be notified by email once the application has been processed.)		Alternate Contact Number
Name of Activity	Date(s) of Activity	Location of Activity

Type of Activity/Resource (Attach details as outlined in the Staff Development Fund Guidelines)

<input type="checkbox"/> Course	<input type="checkbox"/> Online Course	<input type="checkbox"/> Collaboration
<input type="checkbox"/> Workshop	<input type="checkbox"/> Book	<input type="checkbox"/> Practical Research
<input type="checkbox"/> Conference	<input type="checkbox"/> Interschool Visitation	<input type="checkbox"/> Other (please specify) _____

Names of Group Activity Participants

PROJECTED ELIGIBLE PERSONAL EXPENSES (See Staff Development Fund Guidelines)

Conference or Activity Fee/Course Fee/Resource Cost (excludes membership fee) \$ _____

Travel \$ _____

Taxi/Airport Shuttle/Bus/Parking \$ _____

Hotel Accommodation \$ _____

Meals per diem without receipts = \$47 CAD (\$10.00 breakfast; \$13.50 lunch; \$23.50 dinner) \$ _____

Substitute Teacher Required Yes No
 If required, identify the source of funding:
 DU/school to pay (principal/supervisor authorized) *The Staff Development Fund will not reimburse
 Private Business Leave at the substitute teacher rate of pay – \$218 for full day, \$132 for half day – requires an application to Leaves of Absence
 Personal Leave Unpaid – requires an application to Leaves of Absence

Total Substitute Costs related to Private Business Leave
 (All claims for substitute teacher costs will be subject to verification with Edmonton Public Schools.) \$ _____

Total Projected Expenses \$ _____

AMOUNT REQUESTED (to a maximum of \$1,000 per group member to a total maximum of \$5,000 per group)
 Individuals within such groups may be approved for group funding once in any school year. \$ _____

Signature of Group Representative

Date

The personal information collected on this form will be used and disclosed solely for the purpose of processing this application and is collected under the authority of The School Act and Alberta's Freedom of Information and Protection of Privacy Act for the purpose(s) noted above. If you have any questions about this application, please call 780-455-2164.

Submit to: ATA, LOCAL 37
 401, 11010 - 142 Street
 Edmonton, AB T5N 2R1
 Phone: 780-455-2164
 Fax: 780-453-1407
 Email: sdf@edpub.org

This section is to be completed by the Staff Development Fund Administrator.

Funding is: approved not approved \$ _____

Signature of Staff Development Fund Administrator

Date

**STAFF DEVELOPMENT FUND
EXPENSE CLAIM 2018-2019**

Individual
(to a maximum of \$1,800
in a two year period)

Group
(to a maximum of \$1,000
per group member to
a total maximum of
\$5,000 per group)

Surname (Please Print)	Given Names (in full) underline name used	Name of Activity
School/DU	School Phone Number	Date(s) of Activity
Email Address	Alternate Contact Number	Location of Activity
Mailing Address (for reimbursement purposes)		
Street	City	Province
		Postal Code
For group activities, list the names of group members		

Total Amount of Funding Approved (through the application process) \$ _____

ELIGIBLE PERSONAL EXPENSES (See Staff Development Fund Guidelines)

All expenses must be listed in Canadian dollars. Expenses paid in another currency must be accompanied by documentation indicating the exchange rate as per the Bank of Canada, on the date that the expense was incurred. Please include receipts.

Conference or Activity Fee/Course Fee/Resource Cost (attach receipt) \$ _____

Travel

Airfare (attach itinerary and receipt) \$ _____

Private vehicle _____ km at \$0.505/km \$ _____

Total Travel Expenses \$ _____

Taxi/Airport Shuttle/Bus/Parking (attach receipts) \$ _____

Hotel Accommodation (attach receipt) \$ _____

Meals (per diem without receipts = \$47 CAD (\$10 breakfast; \$13.50 lunch; \$23.50 dinner) \$ _____

Substitute Costs (attach supporting documentation related to Private Business Leave)

Date(s) _____

_____ x \$218 = \$ _____
Number of full days

_____ x \$132 = \$ _____
Number of half days

Total Substitute Costs \$ _____

TOTAL ELIGIBLE EXPENSES \$ _____

I confirm that the information provided above is true and accurate and that the expenses claimed are for the approved Staff Development Fund professional development activity/resource.

Signature

Date

The personal information collected on this form will be used and disclosed solely for the purpose of processing this application and is collected under the authority of The School Act and Alberta's Freedom of Information and Protection of Privacy Act for the purpose(s) noted above. If you have any questions about this application, please call 780-455-2164.

Submit to:
ATA, LOCAL 37
401, 11010 - 142 Street
Edmonton, AB T5N 2R1
Phone: 780-455-2164
Fax: 780-453-1407
Email: sdf@edpub.org

Total Expense Reimbursement Approved: \$ _____

Staff Development Fund Administrator

Date