

Pilot Project – Staff Development

Fund Application and Reimbursement Process

(Revised May 2019)

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 2019

1. PURPOSE

As per the Collective Agreement between the Board of Trustees of the Edmonton Public School Board and The Alberta Teachers' Association, 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. These items or activities are determined in consultation with Canada Revenue Agency guidelines.

- **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.**
- **This fund is not meant to replace professional development funds at the school level.**
- **Books must be a single copy for teacher use only (not a student resource) unless it is used as a professional learning book study among a group of teachers where multiple books can be ordered under the group fund.**
- **Items or activities that will incur a taxable benefit will not be covered by the fund.**

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 three 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.
- 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 third portion will be for professional development activities that take place after the last operational day of that school year and before the first operational day of the next 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, 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 approval process for professional development activities beginning after the last operational day of the school year will begin May 1. The Local office is closed in July and August. Any application received after the last operational day will not be considered for support.

The activity must be completed by August 31 of the school year in which the application for funding was approved.

	Dates of PD Activities	Applications Accepted
First Portion of Fund	August 29, 2019 through January 31, 2020	June 1, 2019 through January 17, 2020 (office closed July and August)
Second Portion of Fund	February 1, 2020 through June 29, 2020	January 6, 2020 through June 15, 2020
Third Portion of Fund	June 30, 2020 through August 30, 2020	May 1, 2020 through June 29, 2020 (office closed July and August)

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 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 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 \$150 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 Approximately sixty per cent 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 can not access group funding for the same event.

5. APPLICATION FOR GROUP FUNDING

- 5.1 Approximately forty per cent 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. Deletions of group members will be allowed (permitting the number remains at two or more), but no substitution of group members will be permitted. Only those individuals named in the application are eligible for a reimbursement.
- 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 can not 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. Receipts are required.

- 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). Uber/Lift/etc. is not an option. Search “unconventional travel options” on [Connect](#).
 - 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 rated share of the total cost. Where a bill is shared, both names should appear on the bill. Subject to approval, costs must be reasonably aligned to the professional development activity agenda. Airbnb/VRBO/etc. is not an option. Search “unconventional travel options” on [Connect](#).
 - 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. 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 Claiming education and tuition tax credits (T2202A) when tuition has been reimbursed through this Fund is not allowed under the Income Tax Act. Any questions related to the Income Tax Act or education, tuition and tax credits should be directed to the Canada Revenue Agency.
- 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 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 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 June 2019)

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

- I/we have read the Staff Development Fund Guidelines for Teachers (Revised June 2019).
- 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.**

Funding from the Staff Development Fund is restricted to \$1,800 per individual over a two-year period (2019/20 and 2020/21) 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).



Local 37 of The Alberta Teachers' Association

STAFF DEVELOPMENT FUND EXPENSE CLAIM 2019-2020

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)



Form with fields: 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 THAT ARE NOT COVERED BY OTHER SOURCES (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) - When travelling for work, Uber/Lift is not considered viable, therefore will not be re-imbursed. \$ _____

Hotel Accommodation (attach receipt) - Temporary accommodation rentals like Air-BnB or VRBO will NOT be considered viable accommodations, and therefore will not be reimbursed. \$ _____

Meals per diem without receipts = \$47 CAD [] Breakfast (\$10.00) Date(s): [] Lunch (\$13.50) Date(s): [] Dinner (\$23.50) Date(s): \$ _____

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

Date(s) _____

_____ x \$228.90 = \$ _____
Number of full days

_____ x \$138.60 = \$ _____
Number of half days

Total Substitute Costs \$ _____

TOTAL ELIGIBLE EXPENSES \$ _____

I confirm that I have not accessed other sources of funding for the above 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 _____