

# Teacher Development Fund Application Checklist

(Revised February 2024)

- I/we have read the Teacher Development Fund Guidelines for Teachers.
- I/we have discussed the PD plans and the potential of school funds to support those plans with the principal/DU administrator.
- I/we have downloaded and completed the correct application form (see page 3).
- 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.
- If required, I/we have accessed, completed, and had the supervisor sign the Out-of-Province Professional Development form for any PD activity outside of Alberta. (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. See 4.7 in the Guidelines.

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

**EDMONTON PUBLIC TEACHERS, LOCAL 37**  
**ALBERTA TEACHERS' ASSOCIATION**  
**AND**  
**EDMONTON PUBLIC SCHOOLS**  
**TEACHER DEVELOPMENT FUND GUIDELINES**  
*Revised February 2024*

**1. PURPOSE**

As per the Collective Agreement between the Board of Trustees of Edmonton Public Schools 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 enable teachers or groups of teachers to access funds to support costs incurred in professional development activities or resources related to their individual professional growth plan, including but not limited to: courses, workshops or conferences, online courses and 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. Teachers will not be required to use private business leave to attend professional development through the Teacher Development Fund (TDF). These items or activities are determined in consultation with Canada Revenue Agency guidelines.

The parties shall maintain a joint committee to review guidelines for the fund to ensure there is a clear focus on teaching quality and improvement of student outcomes. The committee will comprise of three teachers appointed by the Teacher Welfare Committee and three members appointed by the School Division.

- **It is not intended that the Teacher Development Fund (TDF) 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.**
- **School or catchment organized events will not be covered under this fund.**
- **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 copies of the same book can be ordered under group funding.**
- **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 annual amount of \$875,000 for the fund. The annual amount will be provided in two equal instalments to Edmonton Public Teachers Local 37 of the Association. The first amount will be provided during the first business week of September and the second amount during the first business week in January. Interest earned on the funds held by Edmonton Public Teachers' Local 37, less associated bank fees, will be reinvested in the fund. If the Teacher Development Fund generates a surplus in a school year, a maximum of 20 per cent of the surplus amount can be re-invested in the fund. Anything beyond 20 per cent is deducted from the subsequent year's allocation.

### 3. ADMINISTRATION

Edmonton Public Teachers Local 37 of the Association shall administer and control the distribution of the Teacher Development Fund. Edmonton Public Teachers Local 37 Treasurer shall provide an annual report to the Superintendent of Schools or delegated authority indicating disbursement of the funds and teacher development priorities. Any teacher or group of teachers may make an application to the Edmonton Public Teachers Local 37.

### 4. APPLICATION FUNDING PARAMETERS ([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 (summer break).

The fund will be administered on a first come, first served basis.

NEW: Funding allocation will be based on a consecutive two-school year period cycle (i.e. activities in the 2022-2023 and 2023-2024 school year are one funding cycle). Effective September 1, 2024, the two-year funding cycle will re-set.

The activity must be completed by the day prior to the first operational day of the ensuing school year in which the application for funding was approved.

	<b>Start Dates of PD Activities</b>	<b>Applications Accepted</b>
<b>First Portion of Fund</b>	The first operational day through January 31 of the school year	June 15 (pre-approval for activities occurring before September 15) Office is closed in July and August.
<b>Second Portion of Fund</b>	February 1 of the school year through to the last operational day of the school year	January 1 through to June 15 of the school year
<b>Third Portion of Fund</b>	The day following the last operational day of the school year through to the day prior to the first operational day of the following school year (summer break)	May 1 of the school year through to June 20 of the school year *Applications for activities after June 20th will not be considered

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.

- 4.1 Any individual actively employed at the time of the planned activity may receive approval for support under the terms of these guidelines.
- 4.2 Applications may be obtained from the [Edmonton Public Teachers website](#) or from Connect (search “Teacher Development Fund”).
- 4.3 Applications must be completed by the individual applying for funding. Approved applications are for a specified activity and are not transferable.
- 4.4 Applications must be accompanied by supporting documentation such as a conference brochure, schedule, pamphlet, information from course calendars, or printed website information that includes a description of the activity, duration, location and related costs.
- 4.5 Applications are not considered received until all required documentation is received and complete.
- 4.6 Applicants requesting funding as a presenter must also be registered for the activity.
- 4.7 Applications must be received by the Teacher Development Fund Administration office not less than **two (2) weeks prior** to the activity.

Due to the timing of the Collective Agreement ratification, effective February 16, 2024 to March 1, 2024, the two-week requirement will be waived.

- 4.8 No consideration for funding will be given to applications received after the activity has commenced.
- 4.9 Applications with a total request for less than \$100 may not be considered.
- 4.10 Applications for funding support will be reviewed by the Teacher 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 Teacher Development Fund.

## 5. APPLICATION FOR [INDIVIDUAL FUNDING](#)

- 5.1 Approximately sixty per cent from this fund will be allocated for [individual applications](#).
- 5.2 Applications must be completed by the individual applying for funding. Approved applications are for a specified activity and are not transferable.
- 5.3 Individual teachers may be granted support to a maximum of \$2,800 within a consecutive two school year period.

Effective until August 31, 2024, members that have received funding in the 2023-2024 school year, prior to the Fund pause, are eligible to claim the difference either on their previously approved and expensed PD activity (documentation is required attesting to the fact that the member did not receive funding from another source), or they may choose to apply for an additional PD activity.

- 5.4 Individuals can not access group funding for the same event.
- 5.5 Upon approval of your professional development activity an email will be sent to you with a copy to your DU Administrator/Principal.

## 6. APPLICATION FOR [GROUP FUNDING](#)

- 6.1 Approximately forty per cent from this fund will be allocated for group applications.
- 6.2 A group of teachers shall be eligible to apply for funding from the Teacher Development Fund for collaborative professional development activities. For the purposes of these guidelines a group shall be defined as being composed of two or more teachers. Individuals within such groups may be approved for group funding once in any school year and must agree to participate in the group activity. 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.
- 6.3 Applications for group funding are to be completed and submitted by a group representative who will also be submitting the corresponding [expense claim form](#).
- 6.4 Group funding will be limited to a maximum of \$1,750 per group member to a total maximum of \$8,750 per group.  
  
Effective until August 31, 2024, members that have received funding in the 2023-2024 school year, prior to the Fund pause, are eligible to claim the difference either on their previously approved and expensed PD activity (documentation is required attesting to the fact that the member did not receive funding from another source), or they may choose to apply for an additional PD activity.
- 6.5 Groups can not access individual funding for the same event.
- 6.6 Upon approval of your group professional development activity an email will be sent to the group representative as well as listed participants with a cc to your DU Administrator/Principal.

## 7. APPLICATION FROM SUBSTITUTE TEACHERS

- 7.1 Substitute teachers are eligible for funding under these guidelines, except for the costs of substitute coverage.
- 7.2 For applications from substitute teachers, active status will be verified with the Managing Director, Human Resources Consulting.
- 7.3 If deactivated, a substitute teacher will forfeit the right to submit an application and/or the right to claim a reimbursement.
- 7.4 Substitute teachers must have worked an average of two days for every month prior to the PD activity from date of activation, to be verified with the Managing Director, Human Resources Consulting.

## 8. ELIGIBILITY OF FUNDS

- 8.1 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.
- 8.2 Eligibility does not guarantee funding.

## 9. ELIGIBLE EXPENSES AND [EXPENSE CLAIMS](#)

All expenses must be reasonably aligned to the professional development activity agenda and listed in **Canadian dollars**. Receipts are required. Receipts must be to the satisfaction of the Fund Administrator. The Fund Administrator may request additional documentation to support the claim.

Expenses paid in another currency must be accompanied by documentation indicating the exchange rate on the date(s) claimed. If proof of the exchange rate is not provided (ie, credit card/bank statement), the Fund Administrator will use the Bank of Canada rate.

Note: Claims for reimbursement related to accommodation/travel/meal expenses will not be supported for any online learning (coursework, conferences, etc).

9.1 The following receipted personal “out-of-pocket” expenses (expenses paid by the applicant) are eligible for reimbursement:

- 9.1.1 Conference or activity fees (excluding membership fees).
- 9.1.2 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 (\$0.55 per kilometer).
- 9.1.3 Car rental costs and fuel expenses related to the car rental agreement.
- 9.1.4 Taxi/shuttle fares and parking costs (receipts required). Uber/Lift/etc. is not an option.
- 9.1.5 Accommodation costs (if the activity is held outside of the greater Edmonton area). Where accommodation is shared, each participant may only claim a prorated share of the total cost. The official receipt must include the name of the facility and the participant’s name(s). Where a bill is shared, both names should appear on the bill. Airbnb/VRBO/etc. is not an option.
- 9.1.6 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 reimbursement.
- 9.1.7 Rewards received through loyalty plans (ie. Air Miles, WestJet, Expedia, etc.) are not eligible expenses. You may choose to use them but will not be reimbursed for their value.
- 9.1.8 When recording a substitute teacher cost as an eligible expense, the absence that has been approved under this fund, staff are to choose the Teacher Development Fund as the reason code in SmartFind. Human Resources will regularly provide the Fund Administrator with information to cross reference the code to fund applications.
- 9.1.9 Tuition and application fees paid to post-secondary institutions excluding U-pass, students' union or other association fees, optional health plan fees, late fees or installment fees.
- 9.1.10 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.

- 9.2 If the activity is in the greater Edmonton area, reimbursement for expenses shall be limited to the registration fee, lunch (except when included in the registration fees), parking and transportation (ie, taxi, public transit).
- 9.3 Proof of registration/completion certificate in approved activity must be provided with the Expense Report.
- 9.4 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.
- 9.5 Receipts for applications for activities in July and August must be received by September 15. Expenses incurred in the summer months will not be reimbursed until after September 5.
- 9.6 The [expense claim form](#) needs to be completed in full and accompanied by all eligible receipts before reimbursement will be processed.

## **10. INTERPRETATION OF GUIDELINES**

Teachers wishing interpretation of the above guidelines should contact the Teacher Development Fund Administrator through the office of Local 37, ATA (780-455-2164) or email [tdf@edpub.org](mailto:tdf@edpub.org).

## **11. APPEAL PROCESS**

- 11.1 Any teacher or group of teachers denied funding or expense reimbursement from the Teacher Development Fund shall be entitled to submit a written appeal of the decision of the Fund Administrator to the Teacher Development Fund Appeal Committee through ATA, Local 37 at [tdf@edpub.org](mailto:tdf@edpub.org) attention Teacher Development Fund Appeals.
- 11.2 The Appeal Committee will review the appeal in a timely manner and the appellant will be informed of the decision.
- 11.3 The decision of the Appeal Committee is final.

## **12. REVIEW OF GUIDELINES**

These guidelines will be reviewed as required by the Teacher Development Fund Joint Committee. Revised copies for the upcoming year will be posted on the Local's website by June 15.