

Pilot Project – Teacher
Development Fund Application
and Reimbursement Process
(Revised May 2021)

- 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 Teacher Development Fund. Review the Teacher 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 tdf@edpub.org or by fax to 780-453-1407; Attention: Teacher 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: Teacher Development Fund Administrator.

EDMONTON PUBLIC TEACHERS, LOCAL 37
ALBERTA TEACHERS' ASSOCIATION
AND
EDMONTON PUBLIC SCHOOLS
TEACHER DEVELOPMENT FUND GUIDELINES
Revised June 2021

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 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 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 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 \$875,000 in 2020-2021 and 2021-2022. 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 Teacher 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 two 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	September 1, 2021 through January 31, 2022	June 1, 2021 through January 17, 2022 (office closed July and August)
Second Portion of Fund	February 1, 2022 through June 29, 2022	January 4, 2022 through June 15, 2022
Third Portion of Fund	June 30, 2022 through August 30, 2022	May 1, 2022 through June 29, 2022 (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](#) or from Connect (search “Teacher 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 “Out of Province Professional Development”).
- 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 Teacher 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 may be considered.
- 3.10 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.
- 3.11 The redistribution of any carryover funds will be determined by the members of the Teacher 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 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. 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 reasonably aligned to the professional development activity agenda and 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.

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

- 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 prorated share of the total cost. Where a bill is shared, both names should appear on the bill. 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 Effective for the 2020/21 school year, a teacher will not be required to use private business leave to attend professional development through the Teacher Development Fund (TDF). When recording an absence that has been approved under this fund, staff are to choose 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.
 - 8.1.9 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, \$228.90 for full day and \$138.60 for half day. A copy of the approval of the Private Business Leave will be required.
 - 8.1.10 Where Personal Leave Unpaid will be accessed to enable participation in the professional development activity, claims for salary are not eligible for reimbursement.
 - 8.1.11 Funds to post-secondary institutions exclude U-pass, students' union or other association fees, optional health plan fees, late fees or installment fees.
 - 8.1.12 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/completion certificate 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 Teacher Development Fund Administrator through the office of Local 37, ATA (780-455-2164) or email tdf@edpub.org.

10. APPEAL PROCESS

- 10.1 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 attention Teacher 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 Teacher Development Fund Advisory Committee. Any revisions to the guidelines will be announced prior to their implementation.