

## **PROFESSIONAL DEVELOPMENT FUND**

### 1. Responsibility for Development and Review of Guidelines

The Working Conditions Committee will establish the guidelines for the administration of the Professional Development Fund. The guidelines will be reviewed at least annually by the Working Conditions Committee and revised as necessary.

### 2. Eligibility

2.1 Any teacher under the Collective Agreement in effect between Lethbridge School District No 51 and Alberta Teachers' Association Local No 41 is eligible for assistance under this fund.

2.2 A teacher is not eligible for support from the P. D. Fund while on leave.

2.3 Teachers may access the P D Fund when under a term contract for a minimum of five (5) months, not when employed on a day to day basis. The professional development activity must occur while the teacher is under term contract.

2.4 Substitute teachers may not access the P D Fund, except under Clause 2.3.

2.5 An exchange teacher working with Lethbridge School District No 51 for a minimum of one (1) year may access the P D Fund for a maximum of one-sixth ( $1/6^{\text{th}}$ ) of the three (3) year's allocation provided a full time teacher ( $1750 \text{ divided by } 6 = \$291.66$ ). This allocation is to provide for professional development courses offered in Alberta only.

### 3. Purposes of the Fund

3.1 The fund has been established for the purpose of assisting teachers with short-term professional development experiences, which will assist them in carrying out their teaching assignments. The fund is designed to assist with the cost of teacher participation in activities such as:

3.1.1 short courses

3.1.2 workshops

3.1.3 non-credit university courses

3.1.4 seminars

3.1.5 conferences

3.1.6 visits to other teachers' classrooms in Lethbridge School District No 51 or to other systems in the province of Alberta. Visits to classrooms outside of Alberta must be approved by the Working Conditions Committee

3.1.7 retreats

3.2 Under special circumstances the fund might also be used to engage the services of a speaker or instructor who would offer professional development to a group of teachers in Lethbridge. Note: this alternative would be allowed only if it would be less expensive to bring the speaker to Lethbridge than to send our teachers to a similar activity.

3.3 Money from the Professional Development Fund may be combined with money from other sources to pay expenses.

3.4 The Professional Development Fund is not intended for any of the following purposes:

- 3.4.1 training teachers in areas other than those for which they are currently responsible or for which they will be responsible in the following year.
  - 3.4.2 assist with any expenses of the professional development activity taken for university credit.
  - 3.4.3 pay the costs of membership in any organization, including ATA Specialist Councils.
  - 3.4.4 teachers going on exchange
- 3.5 Support for activities occurring off-continent may be granted provided the activity has specific educational components as indicated in 3.1 above and that a full written report must be submitted which will include a statement of the employee's activities for each approved day that the employee was absent. The Working Conditions Committee Teacher Chair decides approval for off-continent activities.

4. Applications and Approvals

- 4.1 All applications from individuals must be completed on special application forms, which are available from school offices, or by electronic registration forms, when available.
- 4.2 All applications from individuals must be submitted to the individual's immediate supervisor for approval. Note: the immediate supervisor of school principals is the Superintendent or Deputy Superintendent.
- 4.3 Before approving any application, the immediate supervisor must consider the appropriateness of the activity with respect to all guidelines but paying particular attention to guideline 3 above. The immediate supervisor shall also ensure that the educational welfare of the teacher's students can be maintained through the provision of substitute teachers if required.
- 4.4 After approval by the immediate supervisor, the application must be sent to the ATA office. Applications must be received in the ATA office on or before the following deadlines:

For Activities in:

September  
Retreats  
Alberta List  
October  
November  
December  
January  
February  
March  
April  
May  
June  
July and August

Must be Received By:

June 21 of the previous term  
September 09  
September 09  
September 09  
October 1  
November 1  
December 1  
January 1  
February 1  
March 1  
April 1  
May 1  
June 1

- 4.5 Should a deadline fall on a holiday or weekend, the deadline will be the last school day before the date noted above.
- 4.6 Teachers are reminded that applications must be received in the ATA office before 4:00 p.m. on the deadline dates. Applications received after a deadline will not be processed.

- 4.7 When determining the month a P D activity is in, for funding purposes, use the month the first day of the activity falls on.
- 4.8 For an activity occurring over several months, where sub costs is the only consideration, a separate application should be made for each month.
5. Processing by the ATA office
- At the ATA office the following procedures will be followed:
- 5.1 The application will be checked to ensure that all requested expenses are appropriate according to the guidelines.
- 5.2 The teacher's previous usage of the fund will be checked to ensure that there are adequate funds to allow the requested expenses to be paid. If necessary, the expenses may be reduced and the teacher so informed.
- 5.3 All requests for the current time period will be totalled and if the requests exceed the amount available for this period a pro-rated level (percentage) of support will be determined.
- 5.4 When all the above conditions are met the teacher will be notified and an expense claim form will be sent to the teacher. If the expenses cannot be paid, the teacher will be informed of the reason in writing.
- 5.5 ATA processing shall be completed within four (4) working days of each deadline.
- 5.6 If the pro-rated level drops below 33%, a lottery may be considered.
- 5.7 If a conference is cancelled, the funding is automatically cancelled for members who applied, with the provision that another conference within the same time period can replace the first conference but not to exceed the same level of funding previously granted.
6. Expenses and Administration
- 6.1 A separate computer file shall be maintained for each eligible teacher. The file shall include the total amount of money, which is available to the teacher, as well as the records of all expenses paid on behalf of the teacher during the current three-year (school year) period.
- 6.2 Expenses which are eligible for reimbursement to the teacher from the P D Fund are determined as follows:
- 6.2.1 **Registration Costs**  
Registration Costs will be reimbursed only upon submission of a receipt. The maximum amount of reimbursement shall be equal to the "early bird" registration fee paid by members of the organization.
- NOTE: Costs of banquet tickets may be included as registration costs if they are paid as part of the registration. Costs of luncheon that includes an address by a speaker will also be paid if the costs are part of the registration.
- 6.2.2 **Travel Costs**

Travel costs shall be reimbursed at a rate of \$0.18 per kilometre for distances less than 550 kilometres. Distances over 550 kilometres shall be reimbursed at the rate of \$0.18 per kilometre or economy airfare (**whichever is less**). Receipts must be submitted for airfare.

NOTE: No reimbursement will be made for taxis, parking, tips, etc.

NOTE: A table showing standard rates for reimbursement for travel to centres within Alberta has been prepared and may be found on the back of the P D Fund Application Form.

6.2.3 **Accommodation**

Reimbursement for accommodation shall be at the rate of \$80.00 per night. The number of nights for which accommodation shall be reimbursed shall be one less than the number of days of the activity if the activity is within 200 kilometres of Lethbridge. It shall be equal to the number of days of the activity if it is more than 200 kilometres from Lethbridge.

**The maximum number of days of accommodation for which a teacher may receive reimbursement during any school year is five (5).**

NOTE: There will be no reimbursement for accommodation for any activity that is held within 60 kilometres of Lethbridge.

6.2.4 **Subsistence**

Reimbursement for meals shall be at the rate of \$35.00 per day for all activities that occur outside Lethbridge. The number of days for which reimbursement for subsistence may be obtained shall equal the number of days of the activity as published in the description of the activity.

**The maximum number of days for which reimbursement for subsistence may be received during any school year is five (5).**

NOTE: Travel days are not reimbursed for meals.

6.2.5 **Substitute Costs**

These costs shall be paid on behalf of the teacher at the rate currently in effect according to the Collective Agreement.

**The maximum amount, which may be reimbursed for substitute teacher costs during any school year, shall be five days at the substitute teacher rate.**

**NOTE: Under no circumstances will sub costs be reimbursed from the P D Fund at the rate of 1/200 of the teacher's salary.**

6.2.6 Registration costs paid in currencies other than Canadian Dollars shall be converted to Canadian equivalents at the rate of exchange in effect at the time of payment. It shall be the responsibility of the teacher to provide information regarding the applicable rate of exchange.

6.2.7 No advances for expenses shall be made.

6.2.8 All claims for reimbursement of expenses shall be submitted to the ATA office within 30 days of completion of the activity. The teacher must provide a written explanation within the 30 day period if circumstances prevent a claim being

made within the limit established above. Other than provided above, no reimbursement for expenses shall be made.

6.3 The amount of funds available to each teacher shall be determined in the following manner:

- 6.3.1 Costs of substitute teachers and school retreats are not charged to individual teachers.
- 6.3.2 The maximum amount available to any teacher during a three year period, which includes the current school year and the previous two school years, shall be \$2100.00.
- 6.3.3 The maximum amount available to any teacher during any school year shall be \$1200.00.
- 6.3.4 Where an application has been approved for an individual teacher, and the teacher then is unable to attend the approved activity, a similar activity may be substituted for the approved activity in exceptional circumstances. The teacher must make application to the Working Conditions Committee Teacher Chairperson, who will make a decision on each such request on an individual basis.
- 6.3.5 The Professional Development Fund may be used to support individuals to be absent from their duties for professional development activities for a maximum of five (5) days in any school year.

6.4 Expense claim forms are processed and cheques for reimbursement of expenses are prepared on the first working day of each month and on the first working day following the 15<sup>th</sup> of each month.

## 7. Types of Conferences

### 7.1 Alberta List

- 7.1.1 A memo listing conferences which will be held in Alberta during the current school year as well as standard rates for expenses for each listed conference shall be distributed to teachers on the first day of each school year. The Alberta List includes ATA specialist councils or workshops and conferences organized by Lethbridge School District No 51 (if planning is complete by opening of school year), IRA conferences within Alberta and other conferences that are held within Alberta, which have been proposed by members of the Local and approved for addition to the current year's list by Working Conditions Committee.
- 7.1.2. Teachers who wish to attend any conference listed on the memo should make application prior to September 09.
- 7.1.3 Teachers may apply throughout the year for ATA Specialist Council Conferences, or equivalently approved conferences, as long as correct monthly deadlines are abided by.
- 7.1.4 A maximum of 64% of the fund shall be allocated to support the expenses for teacher attendance at the conferences listed. Applications shall be processed as noted above.

### 7.1 Minor Conferences

A minor activity shall be any activity where the total expenses requested by the teacher is less than \$700.00 and where the teacher is absent from his/her duties for three days or less.

### 7.2 Major Conferences

A major activity shall be any activity where the total expenses requested by the teacher is greater than \$700.00 but less than \$1200.00 and/or where the teacher is absent from his/her duties for more than three days.

A teacher will normally be granted approval for only one major activity during any three school year period.

### 7.3 Special Consideration

The sum of \$1000.00 may be accessed from the fund to allow special consideration to be given if circumstances beyond the control of a teacher prevent a teacher from meeting an application deadline. In these cases the Working Conditions Committee Teacher Chair will decide whether to accept the application. If the application is accepted, reimbursement will be made for registration costs only and registration costs reimbursement will be at one hundred (100%) per cent. A letter clearly outlining the nature of the circumstances, which prevented the teacher from meeting the deadline, must be attached to the application form.

NOTE: If the full amount of \$1000.00 has been expended from the fund before the end of any school year, no additional funds will be made available for special consideration of late applications.

### 7.4 Allocation of Professional Development Funds:

<u>Purpose of Allocations</u>	<u>Amount</u>
Retreats at actual costs per guidelines(applied for by Sept 09)	actual cost per guidelines
Alberta List and October activities	68%
November activities	3%
December activities	3%
January activities	2%
February activities	2%
March activities	4%
April activities	4%
May activities	4%
June activities	4%
July and August activities	2%
September activities	4%

## 8 General Guidelines

8.1 If a teacher believes that any guideline has been applied inappropriately, the teacher may appeal to Working Conditions Committee whose decisions shall be final.

8.2 Working Conditions Committee will not consider appeals if the applications were submitted after the deadline.

## 9 Accounting Procedures

- 9.1 ATA Local No 41 shall make all disbursements from the fund.
- 9.2 The Board shall advance funds to ATA Local No 41 in accordance with the following schedule: September 15: 50% of the total fund; January 15: 50% of the total fund.
- 9.3 ATA Local No 41 shall establish and maintain a separate bank account for the P D Fund. Two signing authorities shall be required for this account.
- 9.4 ATA Local No 41 shall maintain accounting records and shall employ accounting procedures which are consistent with generally accepted records and procedures and which have been approved by the Division of Business Affairs of Lethbridge School District No 51.
- 9.5 ATA Local No 41 shall report on the financial operations of the fund semi-annually and shall provide a comprehensive report on the usage of the fund annually.
- 9.6 The books and records of the Professional Development Fund which are maintained by ATA Local No 41 shall be open for inspection by the Division of Business Affairs of Lethbridge School District No 51 and by the Auditor appointed by the Board of Trustees. The records can be audited by an auditor selected by the ATA provided it is an ATA cost and not out of the fund.
- 9.7 Investment income made from the fund is used to administer the fund. The only expenses that can be charged to the fund are bank charges.

## 10 Guidelines for School Retreats

School retreats and locally operated workshops (see Guidelines 3.2) may be funded by the P D Fund under the following provisions:

- 10.1.1 All teachers attending the retreat or workshop must apply to the fund. They may apply individually or one group application may be submitted on behalf of the group provided all teachers involved have signed the group application.
- 10.1.2 Under no circumstances may the amounts of reimbursement established elsewhere in these guidelines be exceeded.
- 10.1.3 Substitute teacher costs are not part of a school retreat.
- 10.1.5 The “immediate supervisor” for school retreats and workshops shall be the Superintendent of Schools or Deputy Superintendent.
- 10.1.6 School staffs are encouraged to share transportation and rooms for retreats in order to keep costs to a minimum. Reimbursement shall be made on the following basis: up to \$35.00 per teacher.
- 10.1.7 Funding will be limited to one retreat per year of no more than two days (one night) per school.

P D Fund Guideline Revisions: 2000 May 08, 2002 June, 2003 May, 2003 December