

# Staff Development Fund Guidelines

Effective 2018 September 01



## 1. PURPOSE

As per the Collective Agreement between The Board of Trustees of the Calgary Board of Education and The Alberta Teachers' Association, Local 38, this Fund is "available for 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 linked to professional practice. Funding may include registration fees, individual expenses and the cost of substitute teachers. 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 exchanges with other school jurisdictions or for extra-curricular activities, or activities involving the supervision of students.

## 2. APPLICATION FOR INDIVIDUAL FUNDING

Applications must be in compliance with these guidelines to be considered for funding.

- 2.1 Any individual governed by the terms of the ATA/CBE Collective Agreement shall be eligible to apply for one activity in a school year under the terms of these guidelines.
- 2.2 Applications must be made by the individual applying for funding. Approved applications are not transferable. Applications are for those expenses not covered by other sources of funding.
- 2.3 Applications for less than \$50 will not be considered.
- 2.4 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.
- 2.5 Application forms may be obtained from the Calgary Public Teachers website ([local38.teachers.ab.ca](http://local38.teachers.ab.ca)).
- 2.6 Applications must be accompanied by a conference brochure, pamphlet, information from course calendars, or **printed** website information that includes a description of the activity, duration, location and related costs.
- 2.7 Applications for activities that require travel outside of Calgary must be accompanied by the appropriate CBE Travel-Authorization form as per CBE Administration Regulation 2060 **if the activity occurs during regular school hours. If the activity occurs outside of normal school operations, such as evenings, weekends, and holidays, no travel authorization is required.**
  - 2.7.1 If travel is denied by the Calgary Board of Education as per CBE Administration Regulation 2060, teachers have the right to access unspecified personal leave as provided by Clause 17.2.1 of the Collective Agreement and should continue with their application for Staff Development Funding.

- 2.8 Applicants requesting funding as a presenter must also be registered for the activity.
- 2.9 Applications must include the signature of the Principal if the applicant is in a school setting or Superordinate.
- 2.10 Applications are not considered received until all required documentation is received and complete.
- 2.11 No consideration for funding will be given to applications received after the activity has started.
- 2.12 Applications are considered approved once the applicant receives the funding estimate form and expense report from the Staff Development Fund Administrator. *The signed CBE Authorization for Travel does not constitute staff development fund approval of an application.*

### **3. APPLICATION FROM SUBSTITUTE TEACHERS**

- 3.1 Substitute teachers are eligible for funding under these guidelines, except for the costs of substitute coverage.
- 3.2 Applications from substitute teachers must include the signature of the Coordinator of Teacher Staffing.

### **4. APPLICATION FOR GROUP FUNDING**

- 4.1 A group of teachers shall be eligible to apply for funding from the Staff Development Fund for collaborative professional development activities (excluding first aid training) not covered in any other sections of these guidelines. For the purposes of these guidelines a group shall be defined as being comprised of more than four teachers. Individuals within such groups may only apply for this funding once in any school year.
- 4.2 Funds granted for group professional development will not affect individual funding eligibility.
- 4.3 Group applications for funding will be limited to the costs for presenter fees or materials. No funding will be provided for costs for substitute coverage or registration fees.
- 4.4 Applications will not be considered for less than \$100.00 or more than \$500.00.
- 4.5 Applications must include the signature of the Principal or Superordinate.
- 4.6 Applications must be accompanied by a description of the proposed activity, including its duration, location, and related costs.
- 4.7 Applications must be submitted not less than one (1) week and not more than six (6) months prior to the activity.
- 4.8 No consideration for funding will be given to applications received after the activity has commenced.

- 4.9 Group funding application forms may be obtained from the Calgary Public Teachers website ([local38.teachers.ab.ca](http://local38.teachers.ab.ca)).

## **5. APPLICATION FOR SPECIAL INITIATIVE FUNDING**

- 5.1 A portion of the Staff Development Fund may be reserved for funding special initiatives. The amount shall be determined annually by the Staff Development Fund Advisory Committee but shall never exceed the surplus in the fund remaining at the end of the previous school year.
- 5.2 A special initiative is defined as a professional development activity that has a significant impact on student learning and professional practice, meets the needs of the CBE, and is not covered by other sections of these guidelines.
- 5.3 Application for special initiative funding shall be made to the Staff Development Fund Advisory Committee who shall decide all matters related to the application, including the funding amount.
- 5.4 Funds granted for special initiative projects will not affect individual funding eligibility.
- 5.5 Application forms may be obtained from the Calgary Public Teachers website ([local38.teachers.ab.ca](http://local38.teachers.ab.ca)).
- 5.6 A completed Special Initiatives Funding Report is required from all approved applicants by June 15 of the school year in which funding was received.

## **6. FUNDING ELIGIBILITY**

### **6.1 Opportunities Eligible for Funding**

- 6.1.1 Professional development activities and courses relevant to professional practice are eligible for funding.
- 6.1.2 The Calgary Board of Education's system priorities shall be considered when assessing eligibility.
- 6.1.3 Teachers attending the Beginning Teachers' Conference sponsored by The Alberta Teachers' Association shall be eligible one time only for one day of substitute coverage and will not have their individual eligibility affected.
- 6.1.4 Teachers attending the Leadership Essentials for Administrators Conference sponsored by The Alberta Teachers' Association shall be eligible one time only for two days of substitute coverage and will not have their individual eligibility affected.

### **6.2 Individual Eligibility**

- 6.2.1 Teachers who are eligible to receive funding from the Staff Development Fund may apply for one activity in a school year period to receive funding for all eligible expenses to the maximum coverage.
- 6.2.2 Eligibility for funding in future school years is determined according to the "Amount Received" in clause 6.2.3. "Amount Received"

includes the cost of registration fees, travel, accommodation, meals, parking fees, public transit and substitute coverage.

- 6.2.3 Conference dates and up to one day for travel, if required, are eligible for substitute coverage to the maximum allowed.

**Amount Received**

**Eligibility**

Tier 1 (T1)

Up to and including \$400 CAD plus cost of substitute for up to two days\*

- eligible once in a **one** school year period unless accessed T2 or T3

OR

Tier 2 (T2)

\$401 to \$850 CAD plus plus cost of substitute for up to two days\*

- eligible once in a **two** school year period

OR

Tier 3 (T3)

\$851 to \$1,500 CAD plus cost of substitute for up to three days\*

- eligible once in a **three** school year period

\*Cost of substitute release time will be reimbursed to CBE where no travel authorization is required, when the activity occurs in Calgary, or where travel authorization has been approved. Cost of substitute release time will be reimbursed to the teacher if the teacher accessed personal leave at substitute deduction and provided appropriate documentation of the deduction of substitute teacher pay.

- 6.2.4 For the purposes of determining eligibility, the school year is defined as September 1 to August 31.
- 6.2.5 Eligibility does not guarantee funding.

**7. ALLOCATION**

- 7.1 A maximum of \$75,000 from the fund will be allocated for group applications.
- 7.2 Remaining funds shall be allocated on the basis of not more than 50% (\$537,500) for the period September to January, not more than 45% (\$483,750) for the period February to June and 5% (\$53,750) for the months of July and August.
- 7.2.1 Applications for September to January will be accepted after March 1, applications for February to June will be accepted after January 1 and applications for summer activities will be accepted after April 1 and must be received no later than June 15.
- 7.3 The Staff Development Fund Advisory Committee shall determine the annual amount available for funding special initiative projects. The amount

available shall never exceed the surplus in the Fund remaining at the end of the previous school year.

## 8. ELIGIBLE EXPENSES

- 8.1 The following receipted expenses are eligible for reimbursement:
  - 8.1.1 Conference or activity fees (excluding membership fees).
  - 8.1.2 Tuition fees for graduate studies. Applications are limited to tuition fees for one course per school year period. Costs for substitute coverage, accommodation, travel, parking, resource materials and meals are not eligible expenses for completion of course requirements.
  - 8.1.3 Travel expenses (if the activity is held outside of Calgary). Approved applicants will be expected to travel by the most practical and economical means. Kilometrage will be paid at a rate of \$.45 per kilometer to a maximum of \$600.00.
  - 8.1.4 Car rental costs and fuel expenses related to the car rental agreement.
  - 8.1.5 Accommodation costs (to a maximum of \$135 CAD per day). Where accommodation is shared, each participant may only claim a pro rata share of the total cost. Where a bill is shared, both names must appear on the bill.
- 8.2 No receipts are required for meal costs (to a maximum of \$60 CAD per day). These costs are prorated on the basis of \$10 for breakfast, \$20 for lunch, and \$30 for dinner. Costs associated with the purchase of liquor will not be reimbursed.
- 8.3 If the activity is in Calgary, reimbursement for expenses shall be limited to the registration fee, lunch (except where included in the registration fees) parking and public transit.
- 8.4 Air miles or other loyalty plan credits are not eligible expenses.

## 9. EXPENSE CLAIMS

- 9.1 Proof of registration or participation in approved activity must be provided with the Expense Report.
- 9.2 Expense claims, except for meals, must be accompanied by valid receipts. Charge card receipts will not be accepted.
- 9.3 Expense claims must indicate other sources of funding.
- 9.4 Receipted expenses must be submitted within thirty (30) 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 thirty (30) days after completion of the approved activity.

- 9.5 Receipts for applications for July and August must be received by September 15. Expenses occurred in the summer months will not be reimbursed until after September 1.

## **10. INTERPRETATION OF GUIDELINES**

- 10.1 Teachers wishing interpretation of the above guidelines should contact the Staff Development Fund Administrator through the office of Local 38, ATA (403-262-6616) or e-mail (sdf@ata38.ab.ca).
- 10.2 The Staff Development Fund Advisory Committee reserves the right to grant exceptions to these guidelines.

## **11. APPEAL PROCESS**

- 11.1 Any teacher or group of teachers denied funding from the Staff Development Fund shall be entitled to submit a written appeal of the decision of the Fund Administrator to the Chair of the Staff Development Fund Advisory Committee through ATA, Local 38.
- 11.2 The Staff Development Fund Advisory Committee will hear the appeal in a timely manner.
- 11.3 The Chair of the Staff Development Fund Advisory Committee shall inform the appellant of the decision as soon as it is rendered.
- 11.4 The decision of the Staff Development Fund Advisory Committee is final.

## **12. REVIEW OF GUIDELINES**

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

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