

Personal Development Fund

Guidelines



1. Purpose

Teacher well-being is a significant area of interest for the Association. There is an increasing interest by teachers in activities that are related to teacher wellness (i.e., not “professional development”, but designed to support teachers’ mental health and wellness).

The intent of “personal development funds” is to provide members with access to a fund that can be used in a multitude of ways to support their interests, hobbies, or recreation – and thereby supporting their mental health.

The key to this program is the element of choice – members would be able to access activities or materials that are relevant to their own needs and interests. Personal development opportunities can be as unique as every individual.

2. Fund Allocation

- 2.1 The fiscal year of the fund shall be from July 1 through June 30.
- 2.2 Once the funding allocation is exhausted, no further claims may be approved.
- 2.3 Claims shall be assessed based on the date that they are received at the Local 38 office, not the date of the activity being claimed or the material(s) being expensed.

3. Eligibility for Funding

- 3.1 Applicants must be certificated teachers employed by the Calgary Board of Education (CBE) under a contract of employment, or be on the CBE substitute teacher roster, at the time of application in order to be eligible for funding.
- 3.2 Applicants may only be eligible for funding for one claim per year.

4. Eligible Claims

- 4.1 Claims may be submitted for reimbursement of expenses for **activities, courses, tickets, workshops, passes, licenses, subscriptions or other similar expenses** that have a *demonstrable connection* to the teacher’s personal wellness, personal development, hobbies, or recreational purposes.

4.2 The following expenses are specifically excluded and will not be covered by this Fund:

- Taxes (e.g., GST, HST, PST, import taxes/duties)
- Food and beverages (e.g., restaurant charges, groceries, alcohol),
- Travel expenses (e.g., kilometrage, airfare, gasoline, hotel stays, Uber/Taxi costs, train tickets, public transit tickets),
- Consumable materials (e.g., journals, canvases, paints, writing/drawing implements, crafting materials)
- Consumer goods that could be resold or transferred to another person (e.g., Lego, puzzles, books, electronics)
- Costs for expenses which are related to teaching or your occupation (e.g., professional development workshops, work-related training, classroom materials),
- Substitute coverage (e.g., costs for substitute teachers, reimbursement for personal days at a partial salary deduction, any other work absence costs),
- Salary costs (e.g., personal salary, salary of a service-provider),
- Any expense that would otherwise be covered by a claim under the Staff Development Fund,
- Any expense that is already being covered by the applicant's Health Spending Account, Personal Spending Account, or any other funding source.

Examples listed above are not intended to be an exhaustive list, but merely to illustrate potential ineligible expenses within that category.

4.3 If the expense claim submitted is for group or family expense, the portion of the claim for which the teacher is eligible for reimbursement shall be the amount that the teacher would have paid for the same expense/activity had they participated as an individual/non-group, up to the maximum amount described in 5.1.

4.4 Under no circumstances will claims of any kind be approved or considered for individuals other than the teacher identified as eligible under 3.1. The Fund may not be used to support personal development of anyone other than the teacher.

4.5 If the applicant, in the course of their employment with the Calgary Board of Education, is granted a Health/Personal Spending Account (HSA/PSA) and has credits allocated to that account, expenses that would be considered eligible under both 4.1 and the HSA/PSA must first be claimed through the HSA/PSA. Expenses that have already been covered by the HSA or PSA are not eligible to be claimed for this Fund.

4.6 Only claims that, in the sole opinion of the Fund Administrator, meet the eligibility criteria and identified purpose of the Fund shall be accepted.

4.6.1 The decision of the Fund Administrator is final and is not subject to appeal.

5. Funding Eligibility

5.1 Individuals eligible for funding under 3.1 may submit one expense claim per fiscal year (defined in 3.2.1) for an expense of up to \$100.

- 5.2 Expenses must have been incurred within the fund's fiscal year during which they are being claimed.
- 5.3 Reimbursement is provided for a single item/activity per claim – applicants may not submit multiple eligible expenses, even if they wish to do so, on the same claim form.
- 5.4 Applications for less than \$20 will not be considered.

6. Applications for Funding

- 6.1 Applications must be made by the individual applying for reimbursement.
- 6.2 Applicants must certify/affirm their eligibility under 3.1.
- 6.3 Applications must include a detailed, dated receipt for the eligible expense being claimed.
- 6.4 Incomplete applications will be held for a maximum of two weeks after the initial submission, after which time they will be discarded if still incomplete.

7. Reimbursement Process

- 7.1 Approved applications shall be provided reimbursement via electronic banking transfer. Applicants must provide a void cheque or direct deposit information in order to receive funding.
- 7.2 Requests for alternative methods of payment may be made to the Fund Administrator.

8. Interpretation of Guidelines

- 8.1 Teachers wishing interpretation of the above guidelines should contact the office of Local 38, ATA by phone (403-262-6616) or email (sdf@ata38.ab.ca).
- 8.2 Calgary Public Teachers, ATA Local 38, reserves the right to grant exceptions to these guidelines.

9. Appeals and Review of Guidelines

- 9.1 The decisions of the Fund Administrator are final.
- 9.2 Any member may make recommendations for changes/amendments to these guidelines by contacting the Local President (president@ata38.ab.ca)

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