



SCHOOLS' PROFESSIONAL DEVELOPMENT BUDGET

Criteria for Elementary Professional Development Fund

Each year, the Union Steward and their P.D. Committee should review their "Criteria for Use of Funds". A copy of the latest criteria must be sent to the GEETF office. The school-based criteria must be aligned with GEETF criteria and principles for prioritizing the use of school-based P.D. Funds (identified at the end of this document).

Your P.D. Account Number will be used when you fill out either the Cheque Request Form/Payment Voucher or the GEDSB Elementary School's P.D. Budget Expense Form. It will also be used by your secretary when they electronically record the use of an occasional teacher when a staff member attends a conference/course/workshop or job shadows. It is not to be used for the use of an occasional teacher for track and field or other school-related events.

School:

Committee Chair:

Date Developed/Updated:

Please note, this in-school PD Fund is administered at each worksite by a committee of teachers plus the administrator. The Union Steward is the Chair of this Committee. Funds not spent by August 31 are rolled over to the next school year. PD Fund amounts will be shared at the first Steward meeting of the school year or as soon as they are available.

Amount of funds available: school year

PD Fund Account Number (Ledger account 14 digits):

Location Code (3 digits):

The Ledger account for the fund is: 0-0000-10-315-325-1. The Location Code **XXX** is the School Prefix which can be found in Grand Erie 411 Directory. This number is to appear on all expense forms submitted to the GEETF office to ensure charges are applied to the correct In-School PD Account.

1. Committee Structure:

The Committee must be comprised of a minimum of three people including the Administrator and the Chair, and preferably more committee members depending on the size of the staff. The size of the committee should, for voting purposes, be an odd number.



2. **Current Committee:**

Chairperson (Union Steward): _____

Principal or Vice-Principal: _____

Primary: _____

Junior: _____

Intermediate: _____

3. **Eligibility Requirements:**

- a) Applicants must be a member of the Grand Erie Elementary Teachers' Federation (GEETF).
- b) Staff will be encouraged to attend conferences/workshops/PD opportunities which are related to the subject area(s) they are teaching; OR
- c) Staff will be encouraged to attend conferences/workshops/PD opportunities which are related to their professional goals.
- d) PD opportunities are available on the ETFO website, ETFO Voice magazine, OTF/CTF websites, etc.
- e) All suitable applications will be considered. Applications will be considered on a first come/first served basis, but the merits of the application will be considered by the committee, based on the following criteria:
 - members who have previously not accessed the PD fund;
 - members who have not accessed the PD fund in the previous two years;
 - members who are in their first year at the school.
- f) Staff may agree to use PD funds for release time for in-service, or to bring in guest presenters to the school for staff in-service.
- g) PD funds may be used for AQ courses once per year by a member, to a maximum of \$650. (See notes regarding AQ courses in the GEETF PD Fund Criteria.)



4. **Allowable expenses:**

- a) Registration fees for Course/Conference/Workshop (which includes any special meals as part of conference i.e., guest speakers, plenary lunches, etc.).
- b) Professional Association fees related to an in-person conference (only if it reduces the cost of registration to a lesser amount than the non-member registration fee plus Association fee).
- c) Meals – ETFO maximum (\$95) per day. **Claims for the reimbursement of food are limited by the criteria of the school PD Fund as determined by the PD Committee, or by the meal allowances established by ETFO, whichever is less.** Currently, ETFO daily limits are \$20 for breakfast, \$25 for lunch, and \$50 for dinner to a daily maximum of \$95. When submitting receipts for food, submit the detailed receipt, not the credit card chit. The Board will not reimburse solely from a credit card chit.

Meal Maximums:

Breakfast	<input type="text"/>	Lunch	<input type="text"/>
Dinner	<input type="text"/>		

- d) Hotel accommodation – maximum of (\$ per night before taxes).
- e) Travel - The committee is to determine allowable maximums and whether they will implement the Boards mileage rate or ETFOs mileage rate/criteria. **Please select 1 or 2 from the options provided below.**

- 1. Mileage/Transportation/Parking: maximum

The committee will not reimburse 407 toll road highway charges.

The Board mileage rate is currently \$0.68 per km.

Or

- 2. ETFOs Mileage Rate/Guideline (*When a member travels by motor vehicle, the member may claim an additional five cents (\$0.05) per kilometre for each additional authorized passenger. The reimbursement rate for travel costs shall be \$0.61 per kilometre.*)

Our committee will implement Mileage Rate/Guideline.
(GEDSB or ETFOs)

- f) Cost of Occasional Teacher replacement.





- g) Dependent Care – Our committee **will or will not reimburse** for dependent/childcare expenses as per ETFO dependent care guidelines. (*circle will or will not*)

See below for reference:

DEPENDENT CARE (A signed receipt from the caregiver, listing the dependents and applicable dates, must be provided).

- a) Payment for Child and Adult Dependent Care shall not exceed \$75.00 per meeting day for each dependent.*
 - b) Payment for overnight care shall not exceed \$55.00 for the first child/adult dependent plus \$35.00 for each additional child/adult dependent to a maximum of \$125.00 per day.*
 - c) Payment for child care is limited to dependents 18 years of age and under.*
 - d) Overnight care is a reimbursable expense if no caregiver would otherwise be in the home overnight.*
 - e) Payment for adult dependent care is limited to an adult whose care is the responsibility of the member.*
 - f) Subject to prior approval by the Federation, the rate at which dependent care costs for ETFO members who have a dependent with special needs will be the actual additional costs paid by the member for the care of the dependent. Please contact the provincial office for the Application to Exceed Dependent Care Maximum*
- h) Purchase of professional publications for a teacher or a group of teachers that becomes their property and can be taken when they leave. (No textbooks, or student reproducible).

Note: Receipts (itemized) are required for all expenses other than mileage. Mileage will be based on the distance reported in Google Maps. A Google Map must be attached to completed PD Claim Form to receive reimbursement for this expense.

Please scan and send completed updated criteria pages 1 to 4 only to Jeannette Dodds at the GEETF office at jeannette.dodds@granderie.ca.



OTHER THINGS TO NOTE

5. Application/ Claim Process:

*(*As a courtesy, please see the Administrator and Union Steward BEFORE beginning this process.)*

- a) A teacher wishing to access the fund will complete the PD Fund Request Form (see attached), with an estimated cost and forward it to the Union Steward. The following information must be included: a brochure (photocopy) of the conference in question, with a description of the conference, itemized estimate of all costs (based on allowable expenses).
- b) The committee will discuss, approve, or deny the request for funding.
- c) The teacher will be informed of the decision within a month of submitting the request by the Chair of the Committee. Time-sensitive requests will be considered.
- d) The teacher, once approval has been obtained, will make all necessary arrangements to attend/participate in the PD activity (registration, accommodation, and supply coverage arrangements (using the PD Fund Account #). The applicant must also have the approval of the Administrator to attend the conference.
- e) The teacher, upon completion of the PD activity, will complete the PD Expense Claim Form and forward it to the Chair of the Committee, with all appropriate **original** itemized receipts attached, so that it may be promptly submitted to the GEETF office for approval then sent to the Board (Business Services) to process reimbursement. It must be signed by the Administrator, and then returned to the Committee Chair (Union Steward), who will sign and submit the expense claim.
- f) Reimbursement is made via direct deposit to the applicant's bank account. A notification e-mail will be sent to your email account.

6. Record Keeping:

- a) The Chair, or one member of the Committee shall assume the duty of record-keeper.
- b) The Record-Keeper shall check the expenses submitted and approve only those expenses approved by the Committee. The form will be signed by the Claimant, the Union Steward (Chair), and the Administrator. The signed form(s), with appropriate original receipts attached, are forwarded to the GEETF office within two weeks of the date of the PD activity.
- c) The Record-Keeper will ensure that all occasional teacher costs are accurately recorded.
- d) The Chair shall check the balance of the PD Fund account monthly to ensure accuracy.



- e) The Record-Keeper will maintain a file for each teacher request for funding.
- f) The Chair will provide staff with an accounting of the PD Fund in June of each school year.

The status of the fund can be checked through the SDS accounting system. This can be accessed by the secretary or Administrator. The Ledger account for the fund is: 0-0000-10-315-325-1, The Location Code **XXX** is the School Prefix which can be found in Grand Erie 411 Directory. This number is to appear on all expense forms submitted to the GEETF office to ensure charges are applied to the correct In-School PD Account.

The Role of the Union Steward:

- The Union Steward is 'Chair' of the school's P.D. Committee. The Committee must comprise a minimum of 3 people (including the Administrator and Chair) and preferably more committee members depending on the size of the staff. The size of the committee should, for voting purposes, be an odd number.
- The Chair, along with the committee, can approve/deny all or some of the funds requested. This will depend on the amount of money in the P.D. Budget and the school's criteria.
- Ensure all forms and supporting documents are submitted to the GEETF office for reimbursement/payment approval.
- Track/monitor the activity in the school's P.D. account. The GEETF office will provide a printout to each steward up to three (3) times per school year as provided to us from the GEDSB. Alternatively, you may also request a printout from your school secretary or administrator at any time. **Please note: the GEETF office does not have access to the accounts on the SDS accounting system.** Please carefully watch entries which read as "payroll" as this means that an occasional teacher (OT) has been charged against your account. In the past we have found the P.D. accounts numbers were used in error when a teacher attended a workshop that should have been charged elsewhere. It may take 4 – 6 weeks for a reversal to reflect in the account.
- Notify the GEETF office of any discrepancies in the account according to your records. We will work with GEDSB's Business Services to have any errors corrected.



The Role of the Administrator:

- The Administrator is a member of the school's P.D. Committee.
- They vote with the committee on the feasibility of a staff member attending a conference/workshop and any expenses that the school's P.D. Committee will cover.
- The administrator approves the release time for the staff member and arranges for an occasional teacher, if applicable. Release time should not be denied without just cause.
- Their signature must appear on either of the forms used (cheque request or P.D. expense form) to request reimbursement/payment.

The Role of the Grand Erie Elementary Teachers' Federation:

- To notify the schools yearly of their P.D. allotment for the current year as well as a record of unused funds being rolled over. Please note that the rollover and allotment does not occur until at least the end of October. Until that time funds are still available for use whether the account is in a debit or credit balance.
- To provide updates on the status of your P.D. budget. Hard copies will be made available to each Union Steward at training sessions up to three (3) times per school year.
- To check all expense forms and cheque request forms that are being charged against any school's P.D. budget that are sent to us from the GEDSB's Business Services Department or from the schools' P.D. Chair.
- To approve these forms and return them to GEDSB's Business Services Department to process. Our stamp/signature must appear before they are processed. If we find the forms incomplete, e.g., signatures or receipts missing, they are returned to the Union Steward with a note asking for corrections. If the expenses do not meet criteria, they are rejected and sent back to the school.