

Palliser Professional Development Pilot Project Terms of Reference (Updated August 30, 2019)

Background

As per the Letter of Understanding pursuant to the Collective Agreement, a joint party of three teachers appointed by the Teacher Welfare Committee and three members appointed by the Board was formed to establish a pilot project to review the professional development clauses of the Collective Agreement. The members of this Pilot Project have jointly drafted the recommendations below to the Superintendent of Schools & the President of Palliser Local 19.

Presently, the school division allocates approximately \$250,000 per year out of the base student grant to fund individual teacher professional development annually. Funds will be allocated to the Palliser P.D. Council based on the FTE count for teachers employed by Palliser Regional Schools on September 30th of each school year. Effective September 30, 2019, the employer contribution to the Professional Development Fund for each full time equivalent teacher shall be \$500.00 as indicated in the current Collective Agreement. The Collective Agreement further states that “all monies remaining in the fund at the end of the budget year shall remain in the fund”. In our review of professional development expenditures over the last three years, teachers have spent approximately \$80,000 per year. Teachers currently have approximately \$780,000 in unspent individual and site teacher professional development funds, and the rate at which the professional development funds are being spent is not reducing the accumulating surplus. This accumulation of unused funds creates a financial liability.

The parties agree that ongoing professional development and collaboration for teachers is critical to achieving the vision of district priorities and plans, school improvement plans and a teacher’s individual professional growth plan. The current model created a situation of unbalanced access to funds. To this end, members of the pilot project jointly suggested changes to the Palliser Professional Development Reference Guide for the duration of the project. These changes are intended to improve the ability for teachers and teacher teams to access the necessary funds to participate in purposeful, pertinent and timely professional development activities.

Guiding Principles

The guiding principles for the pilot project are to:

1. Ensure effective professional development is available for teachers so they can expand their professional efficacy to ensure all students have access to an exceptional education.
2. Support teachers as career long learners, who engage in ongoing professional development.

3. Provide universal access by maximizing awareness and reducing barriers to funding for professional development.
4. Recognize that costs associated with Professional Development activities are an important consideration.
5. Give priority to professional development opportunities that are available locally.
6. Approve the use of P.D. funds as a collaborative process of the Palliser P.D. Council.
7. Recognize the need for fiscal responsibility.

Palliser P.D. Council

In keeping with this pilot project, we jointly recommend that a central Palliser P.D. Council is established to oversee changes that will facilitate access to funds for professional development, as outlined in the Palliser P.D. Reference Guide. The Palliser P.D. Council shall consist of 4 members, 3 teachers appointed by the Teacher Welfare Committee and 1 member appointed by the Superintendent. The Palliser P.D. Council will track professional development expenditures and report to staff twice a year.

As teachers make application for individual professional development funds, the Palliser P.D. Council acts as the governing body to approve or not approve applications using the criteria in the Terms of Reference below. Applications for professional development are approved by consensus of the Palliser P.D. Council members with approval required from each participating body.

1. Responsibility for Development and Review of Guidelines

The P.D. Pilot Project development committee will establish the guidelines for the administration of the Professional Development Fund as per the Letter of Understanding pursuant to the Collective Agreement.

2. Eligibility

2.1 Individual Teachers

- 2.1.1 Any teacher under the Collective Agreement in effect between Palliser Regional Schools and Alberta Teachers' Association Local No. 19, that meets the criteria below, is eligible for assistance under this fund.
- 2.1.2 Teachers, under a term contract for a minimum of (5) five consecutive months may access the P.D. Fund. The professional development activity must occur while the teacher is under term contract. Teachers may not access the P.D. Fund when employed on a day to day basis.
- 2.1.3 A teacher is not eligible for support from the P.D. fund while on leave.

2.2 Collaborative Groups of Teachers

- 2.2.1 Groups of teachers that wish to pool their 3 year allocations (see 6.4 below) may apply for funds to cover the costs of providing professional development activities within the division. Events using P.D. Council Funds must be open to all Palliser teachers. Applications to access funds in this manner must be submitted 6 - 8 weeks in advance to provide time for approval and planning of the event. Group applications will be reviewed by the PD Council within two weeks of receipt.
- 2.2.2 Groups of teachers from the same site shall access remaining site based funds first, if these funds exist.
- 2.2.3 Teachers who wish to attend these collaborative events must request Individual P.D. funds to cover any expenses they incur.

3. Purposes of the funds provided to teachers are to help cover the costs of:

- ❖ registration for seminars, workshops, conferences and non-credit courses including online non-credit courses, workshops, videos and webinars,
 - ❖ travel expenses related to professional development,
 - ❖ accommodations,
 - ❖ meals (per diem rate listed),
 - ❖ specialist council memberships,
 - ❖ substitute costs, either to attend a P.D. activity, to participate in collaboration, focused on professional practice, with colleagues or specialists, or to visit/observe other teachers' classrooms within Palliser Regional Schools,
 - ❖ professional resources or educational literature that is directly related to the teacher's assignment or the teacher's professional growth plan.
 - ❖ engaging the services of a speaker or instructor who would offer professional development to a group of teachers if it would be less expensive to bring the speaker to Lethbridge/Calgary than to send our teachers to a similar activity.
- 3.1 Professional Development Funds would not typically be used to pay the costs of membership in any organization, except ATA Specialist Councils. The only exception to this would be when membership is required to reduce the cost of conference attendance.
 - 3.2 P.D. Council Funds may be combined with other funds such as Site Funds and grants.

4. Applications and Approvals

- 4.1 Individuals wishing to participate in a professional development activity will need to complete and submit an application form to the Site P.D. Committee a minimum of two weeks prior to the activity for endorsement. It will then be submitted to the P.D. Council for approval. The P.D. Council will respond within (five) 5 business days.
- 4.2 Members who want to attend a professional development activity are encouraged to apply for the event early enough to take advantage of an early registration rate if one is offered. Members are also expected to take advantage of early booking rates for any airfare.
- 4.3 If the same conference is being offered in two venues, an application should be made for the least costly venue whenever possible.
- 4.4 If registration is paid for at least three months in advance of the P.D. event, teachers can make two submissions for reimbursement, the first only for registration and airfare (if required) and the second for all other expenses.
- 4.5 The Expense portion of the Application Form must be filled out within 30 days after attendance to a Professional Development Activity. It will then be submitted with scanned copies of original receipts to the P.D. Council. Receipts must be in Canadian funds or, if amounts are in foreign currency, must be accompanied by a credit card statement that includes the Canadian exchange rate. Receipts and scanned copies of original receipts shall be submitted to the P.D. Council.
- 4.6 Itemized receipts are required and must be submitted separately for each individual requesting reimbursement. For example, if two people share a hotel room, each must submit a separate receipt for their portion of the expense. Applicant's name MUST be on all receipts for hotels, flights and registration.
- 4.7 In the event that a teacher is unable to attend an event they have already received funds for, the teacher will be responsible for reimbursing any funds that have been advanced to them. This requirement may be waived by the P.D. Council in exceptional circumstances.
- 4.8 Following a professional development activity, the teacher is required to fill out a reimbursement form and a **Post-Professional Development Activity Summary** and submit it to the P.D. Council within 30 days for timely reimbursement.
- 4.9 In keeping with this pilot project, the Site P.D. Committee will endorse P.D. applications, but approval lies only with the Palliser P.D. Council.
- 4.10 These funds are for teacher use only.

5. Processing by Palliser P.D. Council

- 5.1 The application will be checked to ensure that all requested expenses are appropriate to the guidelines.
- 5.2 When all of the above conditions are met, the teacher will be notified and an expense claim form will be sent to the teacher. If the application is denied, the teacher will be informed of the reason in writing prior to the event.
- 5.3 If a conference is cancelled, the funding is automatically cancelled and no reimbursement will be issued. Teachers are encouraged to ensure their costs are refundable.

6. Expenses and Administration

- 6.1 Travel costs will be reimbursed as per AP 508 on Travel Reimbursement. Members are expected to take advantage of early booking rates for any airfare.
- 6.2 If the fund balance ever drops below 35% of the annual allocation, a lottery may be considered for all approved applications. Teachers who have not yet used funds will have priority over those who have already accessed funds.
- 6.3 Information shall be maintained for each eligible teacher. The information shall include a record of expenses paid for out of the P.D. Council Fund.
- 6.4 The maximum amount available to any teacher from the P.D. Council Fund during a three year period shall be \$2,500.00. Substitute teacher costs will be covered in addition to this amount through the PD Council Fund.
- 6.5 Teachers who retain funds in their Collective Agreement Individual Professional Development fund will be required to use these funds prior to accessing supplementary funds from the P.D. Council.
- 6.6 Accommodations
 - 6.6.1 Reimbursement for accommodations shall be at the maximum of \$250.00 (CDN) per night, excluding applicable taxes. Exceptions may be considered for venue hotels.
 - 6.6.2 The maximum number of days of accommodation for which a teacher may receive reimbursement during any school year is five (5). The number of nights for which accommodation shall be reimbursed shall be equal to the number of days of the activity.
- 6.7 Subsistence Reimbursement
 - 6.7.1 Reimbursement for meals shall be at the current per diem rate. If meals are included in the event, no reimbursement is allowable.
 - 6.7.2 Maximum number of days for which reimbursement for subsistence may be received during any school year is five (5).
- 6.8 Substitute Costs

- 6.8.1 These costs shall be paid on behalf of the teacher at the rate currently in effect according to the collective agreement.
- 6.8.2 The maximum amount which may be reimbursed for substitute teacher cost for professional development during any three year allocation shall be five days (5) at the substitute teacher rate.
- 6.8.3 Costs of substitute teachers are not charged to individual teachers. The costs of substitute teachers will be taken from the P.D. Council Fund and will not be considered part of the three year allocation.
- 6.8.4 The P.D. Council 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.

7. General Guidelines

- 7.1 If the Palliser P.D. Council needs clarification, they will contact the member directly for information.
- 7.2 If a teacher believes that any guideline has been applied inappropriately, the teacher may request a reconsideration to the Palliser P.D. Council whose decision shall be final.

8. Transferability of P.D. funds

- 8.1 Should a member retire or leave the division, any unused funds will be rolled into the P.D. Council Funds.
- 8.2 For the purpose of the pilot project and to promote the use of the funds for professional development, a teacher may transfer money from his/her current individual fund to the P.D. Council Fund once per year by filling out a [*Transfer of Funds form*](#).

9. Evaluation of Professional Development Pilot Project

- 9.1 At the conclusion of one year of the pilot project the PD Pilot Project Committee will meet to assess the success of the project. The committee will draft a summary report with recommendations which will be submitted to the Superintendent of Schools and the President of ATA Local 19 for discussion with both parties. The pilot project will continue in its current form until the final report is submitted in March of 2021.