



Holy Spirit Catholic Local 5 Professional Development Fund Policy

Committee: Professional Development Fund

Policy Number: 2.2 | Pg 1 of 7

Revised: Sept 2018, Oct 2022, Feb 2023, Sept 2023, Jan 2024, Sept 2025, May 2026

PHILOSOPHY

The Alberta Teachers' Association encourages and supports teachers' pursuit of professional learning opportunities.

POLICY

1. **Purposes of the Fund:** The Alberta Teachers' Association, through policy approved unanimously at the 2011 Annual Representative Assembly, defines professional development as the wide range of programs, activities and services teachers identify and undertake individually or collectively to contribute to the profession. Expenditures related to travel and accommodation (associated with the PD event or activity), tuition, registration, and materials (books, teaching, and learning resources) are deemed acceptable. However, expenditures related to the purchase of hardware (i.e., laptops, iPads, etc.) are NOT seen as acceptable use of professional development funds.

1.1. Professional Development Experiences and Resources

Background: The fund has been established for the purpose of providing teachers with professional development experiences and resources which will build teaching capacity and improve teacher efficacy. The fund is designed to provide for teacher participation in activities or the acquisition of resources such as:

- Short courses,
- Workshops,
- Seminars,
- Online courses,
- University courses (credit and non-credit),
- Conferences,
- First Aid Courses
- Travel expenses related to professional development,
- Collaboration time – focused on professional practice – with colleagues and/or specialists,
- Specialist Council fees,
- Professional association membership fees,
- Professional pedagogy and practice publications and/or subscriptions
- Other professional development activities, as recommended for approval by a sub-committee of the ATA-Executive Council. Any "Other PD" activity must have a direct link to student instruction (i.e. teach you how to teach

___) and the Alberta Education Teaching Quality Standard. Expenses related to recreational or leisure activities are categorically ineligible for reimbursement. For the purposes of this policy, recreational or leisure activities include, but are not limited to, attendance at sporting events, theatrical performances, concerts, festivals, amusement venues, or any other event primarily intended for entertainment or personal enjoyment. Claims that such activities contribute to professional development, instructional practice, curriculum enhancement, or subject-area expertise will not be considered grounds for approval.

Guidelines regarding professional development and taxable benefits as per CRA-PD fund hand out:

Specific employment-related training: We generally consider that courses taken to maintain or upgrade employment related skills are mainly for the employer's benefit when it is reasonable to assume that the employee will resume his or her employment for a reasonable period of time after he or she completes the course. For example, tuition fees and other associated costs, such as books, meals, travel, and accommodation, paid for courses leading to a degree, diploma, or certificate in a field related to the employee's current or future responsibilities are not a taxable benefit.

General employment-related training: We generally consider that other business related courses, although not directly related to the employer's own business, are taken mainly for the employer's benefit. For example, fees paid for stress management, employment equity, first aid, and language courses are not a taxable benefit.

Personal interest training: We consider that courses for personal interest or technical skills not related to the employer's business are taken mainly for the employee's benefit and, therefore, are a taxable benefit.

If a member is uncertain as to whether their planned professional activity falls within the scope of this policy, the member is strongly encouraged to contact the ATA PD chair for clarification prior to undertaking the activity.

1.2. Professional Development Grants

Background: When revenues allow, a number of professional development grants will be available for teachers. These Professional Development Grants will be accessed via an application process.

1.2.1. Professional Development Additional Course Grant: \$6000 divided among applicants; up to \$1500 per applicant

Purpose: To assist teachers in attaining course credits and/or technical training at an accredited post-secondary institution or trade school.

The grant will be used to pay tuition and materials costs associated with attaining course credits and/or technical training.

Application Deadline: Request must be submitted to the ATA PD Chair by September 30 of the school year during which the courses are occurring. If money remains after September dispersal, a January 30 deadline will be set for January - May courses. If money remains after January dispersal, a May 30 deadline will be set for June-August courses.

1.2.2. Professional Development Blueprints Retreat Grant: \$5000

Purpose: To assist teachers in attending the Alberta Catholic School Trustees' Association Blueprints Retreat.

The grant will be used to pay PD costs included in the PD Policy up to \$1500.

Application Deadline: Request must be submitted to the ATA PD Chair at least four weeks prior to the Blueprints Retreat.

1.2.3. Professional Development Maria Zappone Pilgrimage Grant: \$6000

Purpose: To assist teachers in attending a religious pilgrimage offered and organized through a religious pilgrimage organization/company.

The grant will be used to pay PD costs included in the PD Policy up to \$1500/person.

Application Deadline: Request must be submitted to the ATA PD Chair at least four weeks prior to the start date of the pilgrimage.

1.2.4. Professional Development Master's and Doctoral Degree Grant:
\$32000 divided among applicants; up to \$4 000 per applicant per school year

Purpose: To assist teachers in attaining a Master's or Doctoral Degree.

The grant will be used to pay tuition and materials costs associated with attaining a Master's or Doctoral Degree.

Application Deadline: Request must be submitted to the ATA PD Chair by September 30 of the school year during which the courses are occurring. If money remains after September dispersal, a January 30 deadline will be set for January - May courses. If money remains after January dispersal, a May 30 deadline will be set for June-August courses.

1.2.5. Professional Development Return from Leave Grant: \$5000

Contracted PD Fund allotment pro-rated to FTE upon return. i.e. a teacher who returns at 1.0 FTE receives \$500, a teacher who returns at 0.5 FTE receives \$250

Purpose: To provide PD funds for teachers who return from a leave after September 30th, and have not received a yearly PD Fund allotment from the Board.

Application Deadline: Request must be submitted to the ATA PD Chair within four weeks of returning from a leave.

1.2.6. Professional Development School Initiative Grant: \$35000

Purpose: To provide PD funds to a group of two or more teachers embarking on a long-term task focused on teaching and learning.

Application Deadline: Request must be submitted to the ATA PD Chair by September 30th of the school year during which the initiative is being implemented. If money remains after September dispersal, a January 30th deadline will be set for new or continuing initiatives.

1.2.7. Professional Development Specialist Council Conference Grant: \$10000

Purpose: To assist teachers in attending a Provincial (Alberta) ATA Specialist Council Conference.

The grant will be used to pay PD costs included in the PD Policy.

Application Deadline: Request must be submitted to the ATA PD Chair by September 30th of the school year during which the conference is occurring.

1.2.8. Professional Development S.P.I.C.E. Retreat Grant: \$5000

Purpose: To assist teachers in attending the Alberta Catholic School Trustees' Association S.P.I.C.E. (Sharing Purpose in Catholic Education) Retreat.

The grant will be used to pay PD costs included in the PD Policy up to \$1500.

Application Deadline: Request must be submitted to the ATA PD Chair at least four weeks prior to the S.P.I.C.E. Retreat.

1.2.9. Professional Development Substitute Teacher Grant: \$500

Purpose: To assist substitute teachers in attending professional development activities. Eligibility for the grant will be determined by the teacher's designation on the Approved Substitute Teacher list from the Board.

The grant will be used to pay registration costs, rate of pay, and/or PD costs included in the PD Policy up to \$500 for PD activities outlined in the PD Policy.

Application Deadline: Request must be submitted to the ATA PD Chair at least four weeks prior to the PD activity.

- 1.3. Money from The Professional Development Fund may be combined with money from other sources to pay expenses (e.g. U of L Teacher-Associate honorarium funds).
- 1.4. The Professional Development Fund (as per Revenue Canada) cannot be used to purchase capital equipment (e.g. computer hardware, furniture).

2. Professional Development Reimbursement

- 2.1. All reimbursement claims from individuals must be completed on special claim forms, which are online on the local 5 website, and must be sent to the ATA PD chair who will forward the claim to the PD Fund Bookkeeper.
- 2.2. To ensure that Professional Development Funds remain non-taxable, an officer of the Local must sign all PD claim forms. This person shall be the ATA PD Chair.

3. Eligibility & Professional Development Fund Determination (refer to Collective Agreement Article #9)

- 3.1. Professional Development Funds for the current school year will be allocated to each teacher employed by Holy Spirit Roman Catholic Separate School Division.

4. Accumulation of the Professional Development Fund

- 4.1. Funds may accumulate
- 4.2. When a teacher is no longer employed by the Holy Spirit Roman Catholic Separate School Division, any funds remaining in his/her Professional Development Fund will cease to be available, and will be assigned for Professional Development use determined by the Local.
- 4.3. When a teacher, although still employed by the Holy Spirit Roman Catholic Separate School Division, is on leave for the entirety of the school year, he/she

will maintain his/her fund balance and can access funds, but will not receive new funds for the year he/she is on leave.

5. Administration of the Professional Development Fund

- 5.1. The Local shall make all disbursements from the Professional Development Fund.
- 5.2. The Board shall advance funds to the Local in accordance with the Collective Agreement.
- 5.3. A separate bank account for the Professional Development Fund shall be established and maintained by the Local. Two of three signing authorities shall be required for this account. The signing authorities will be the Local's PD Chair, Treasurer, and President.
- 5.4. The Local shall maintain and employ accounting records and procedures which are consistent with generally accepted records and procedures, and which have been approved by the Alberta Teachers' Association.
- 5.5. The Local shall report on the financial operations of the fund semi-annually; and shall provide a comprehensive report on the usage of the fund, annually, to the Board.
- 5.6. Accounting records of the Professional Development Fund, which are maintained by the Local, shall be open for inspection by an officer of the Board, and an auditor appointed by the Board.
- 5.7. Accounting records can be audited by an auditor selected by the Local, provided costs are paid by the Local, and not paid out of the Professional Development Fund.
- 5.8. Investment income earned by the Professional Development Fund will be used to administer the Professional Development Fund. The only other expenses charged to the Professional Development Fund are bank charges for the administration of the Professional Development Fund.
- 5.9. A separate computer file shall be maintained for each eligible teacher by the PD Fund Bookkeeper. A monthly statement will be issued by the PD Fund Bookkeeper, which shall include the total amount of money available to the teacher, as well as the records of all expenses paid on behalf of the teacher. A hard-copy file for each teacher will be maintained by the PD Fund Bookkeeper.
- 5.10. Expenses which are eligible for reimbursement to the teacher from the Professional Development Fund are determined as follows:
 - 5.10.1. Registration costs will be reimbursed only upon submission of a receipt. Registration and pre-booked travel costs may be claimed prior to the dates of the conference or travel to ensure timely reimbursement of out-of-pocket expenses. These claims must be supported by receipts.
 - 5.10.2. Costs paid in currencies other than Canadian Dollars shall be converted to the Canadian equivalent at the rate of exchange in effect at the time of the teacher's payment.

- 5.10.3. Daily rate of substitute teacher pay costs are paid first out of the teacher's Professional Development Fund.
- 5.10.4. Payment for PD expenses cannot exceed an individual's present Professional Development Fund balance unless provisions have been made according to Policy 6.0 below.
- 5.10.5. In a new school year, reimbursement cannot be sought for past expenses incurred when the teacher had insufficient funds available in his/her fund.
- 5.10.6. No reimbursement will be made for hotel, airline or any other form of reward points used to defray costs.
- 5.10.7. The Local's fiscal year-end deadline for expenses incurred up to June 30th is September 10. If circumstances warrant the filing of a late claim, after the fiscal year-end deadline, reimbursement of expenses is to occur at the discretion of the ATA PD Chair.

6. Transferability of the Professional Development Fund

- 6.1.** To promote use of the fund for professional development, a teacher may transfer money from his/her fund to another teacher's fund only once per year.
- 6.2.** Conditions of transferability:
 - 6.2.1. The maximum amount which can be transferred to one teacher is equal to the amount allotted per teacher per year as per the Collective Agreement. A "lending" teacher can transfer this amount to as many recipients as his/her PD Fund balance allows. e.g. If Mr. X has a PD Fund balance of \$1500, he can "lend" \$500 (yearly allotment) to three different teachers.
 - 6.2.2. The transfer of funds takes place only after filling out the required transfer form, which states that the recipient of the funds will automatically repay (from the recipient's PD Fund account) the exact amount to the "lending" teacher the following school year.
 - 6.2.3. If the recipient retires/resigns or otherwise ceases to be employed by the Board before the funds can be repaid, no reimbursement will occur.
 - 6.2.4. If the "lending" teacher retires/resigns or otherwise ceases to be employed by the Board before the funds can be repaid, no reimbursement will occur.

7. Appeals

- 7.1.** Any disputes regarding reimbursement of funds or approval of PD activities will be referred to ATA HSC Local 5 Executive Council who will render a decision based on the policy's wording and the spirit of professional development.