



# GUIDELINES

## Professional Growth Subsidy Fund

Calgary Catholic Teachers ATA Local #55

**Effective: September 1, 2023**

### A. TERMS OF REFERENCE:

COLLECTIVE AGREEMENT: CLAUSE 9.3.2

Professional Development Leave and Professional Growth Subsidy. The Board shall provide to the Professional Growth Subsidy 400 substitute days effective *September 1, 2016* with the option to purchase an additional 225 substitute days for the purpose of professional development.

The Board will make available for the purpose of professional development a fund of **\$300,000.00** effective **September 1, 2023**. This fund will be jointly administered by the Professional Growth Subsidy Committee and the Superintendent, Personnel Services or designate in the following manner.

The Professional Growth Subsidy Committee (PGSC) will review applications from teachers requiring financial assistance and will in turn make recommendations to the Superintendent, Personnel Services, Personnel Services or designate as to disbursements. The Superintendent, Personnel Services or designate shall have final right of approval on such disbursements.

The fund and its operation will be subject to audit by the Board.

### B. ADMINISTRATION:

1. The operating committee shall consist of six members (one representative per school-based division, two members-at-large) of the Local elected by the Council of School Representatives (CSR) with members elected on a rotating basis. The President of the Local or designate and the Superintendent, Personnel Services or designate sit as ex-officio members of the Professional Growth Subsidy Committee.
2. The Committee shall meet at least once a month during the school year to review the applications from teachers requiring financial assistance and will in turn make recommendations to the Superintendent, Personnel Services or designate.
3. The Committee must submit an annual report listing individual applications and detailing disbursements. The term of the report is to coincide with the Board's fiscal year. Copies will be distributed to the Alberta Teachers' Association Local #55 Executive, the Superintendent, Personnel Services, and the Board of Trustees.
4. The Committee will review annually its operations and guidelines and make recommendations for necessary change.

### C. INDIVIDUAL GRANT DISPOSITION:

1. Subsidies are available only to teachers who are paid members of the Alberta Teachers' Association. This includes teachers on leave provided they have paid the appropriate fees.
2. Forms must be completed and signed only by teachers under contract. The committee can only offer financial support when the teacher is under contract at application date and at the date of conference completion.

3. Applicants will receive written approval or refusal of their application.
4. Applications for tuition for a specific course may be submitted to either PIF or PGS but not both within the same traditional school calendar year. E.g., once your application is approved for PGS, you will be ineligible for PIF tuition funding until the following traditional school calendar year. Once you have been approved for PIF tuition, you will be ineligible to access PGS tuition funding until the following traditional school calendar year.
5. District PCards cannot be used for payment or reimbursement of any expenses covered under Professional Growth Subsidy Fund. Failure to follow this criteria may result in inability to access PGS Fund for up to 2 years

6. a) **In City/In Province/Virtual Conferences:**

Professional Growth Subsidy Fund will provide assistance to the first 20 individuals applying for subsidy to attend the same conference.

b) **Out of Province:**

Individuals attending out-of-province conferences may be restricted under the terms of Interim Regulations GCI (see #3). This policy may not be applied, however, if attendance at the conference *does not require release from regular assignment*.

GCI #3 states: No more than twelve (12) employees from District school-based staff may attend the same conference, convention, seminar, or visitation without the prior approval of the Superintendent, Personnel Services or designate. No more than three (3) participants are to be school-based staff employees from the same school unless agreed upon by both parties. (N.B. *The Catholic School Centre, St. Paul Centre and St. Leo's Centre will be considered as one school site*).

7. Out-of-Province applications must be submitted via email to accurately record a time of receipt) **no earlier than 5 months before the conference start date**. Applications received prior to this date will be returned to applicant for resubmission within the 5-month time frame.

Applications must be received via email (to accurately record a time of receipt) a minimum of **5 working days prior to the PGSC meeting date**. Applications received without 5 working days prior to the PGSC meeting will go to the next month's committee meeting for consideration.

In-City/In-Province/Virtual applications must be submitted via email 14 **working days** prior to the conference. Applications will be considered only if adequate time is available for processing. Applications received on or after a conference/workshop start date will not be considered.

8. Applications must be accompanied by a copy of a conference overview or conference at-a-glance or typed letterhead from the conference organizer including a listing of speakers, times, dates, and topics of workshops the applicant is attending. If conference is in another language attendee will provide an English translation for conference materials to the committee.

***N.B.:*** ATA sponsored specialist council conference applications will be accepted without a conference brochure. All other conferences/workshops require a brochure or conference overview or conference at-a-glance or typed letterhead from the conference organizer including a listing of speakers, times, dates, and topics of workshops the applicant is attending or a list of workshops attending and a list of speakers.

As a courtesy, each application that requires absence from regular assignment should be signed by the appropriate administrator to indicate his/her knowledge of the proposed absence for professional development reasons.

Conferences held during Teacher's Convention require permission to be granted in writing from ATA Provincial. Please go <https://ATA.smapply.ca> to apply. This approval from ATA Provincial **must be included** with the application for the PGS Committee to consider the application.

9. Individuals applying for virtual/in-city/in-province or tuition funding may receive no more than one grant per traditional school calendar year (September 1 to August 31). This grant may be either for a conference/workshop or for tuition, but not both.

Applications for Conferences/Workshops are accepted up to five (5) calendar months in advance of the conference date. Applications received outside of this 5-month window will be returned to applicant for resubmission within the 5-month time frame.

10. Individuals applying for out-of-province funding may receive no more than one grant every second traditional calendar year (September 1<sup>st</sup> through August 31<sup>st</sup>). Applicants receiving an out-of-province grant are ineligible to receive **any** additional PGS grant (tuition or workshop/conference) funding for the traditional calendar year following the year that they received out-of-province funding.
11. If a similar or identical conference is being held in more than one geographic centre, funding will be only provided for a location closest to Calgary.
12. Applicants requesting funding as a presenter must also be registered at the conference.
13. Under no circumstances will individual grants be allowed for group conference or group activities organized by school system personnel during a teacher day.
14. Teachers may apply for up to two substitute days depending on the nature of the conference and the availability of substitute days. Any additional days required for reasons such as extended conference time, holiday, airline delays or misfortune due to extenuating circumstance, cannot be covered by the PGS fund.

Any leave requested **over two days** must be requested and approved by the appropriate Collective Agreement process. Most leaves can be requested through "HR self-service" (e.g. Teacher Leave (Clause 12.1 of the Collective Agreement), Personal leave (12.2), or Unspecified Leave (12.3). Approval must be granted by the District before the leave is taken.

15. When a teacher is allocated conference support, it is strictly for that conference and that conference only.
16. Following the professional development activity, applicants must submit the PGS Receipt Submission Form within *two (2) months* of conference completion along with proof of conference attendance (typically name badge). If the form, receipts and proof of attendance are not forthcoming, no funds will be allotted, and the substitute teacher costs will be deducted from any subsequent approved funding. If extenuating circumstances preclude the teacher from submitting receipts on time, the teacher must advise in writing via email to [pgs@ataloc55.ab.ca](mailto:pgs@ataloc55.ab.ca). A conference registration receipt and proof of attendance is required with original receipts before any reimbursement will take place.

**Applicants are encouraged to make travel arrangements with the most flexibility to ensure they are protected should unanticipated circumstances arise that prevent them from attending the conference.**

17. All applicants for **out-of-province conferences** held during the summer vacation (July-August) must be approved by the Professional Growth Subsidy Committee and must be submitted no later than **5 working days prior to the June meeting of the committee** in any traditional school calendar year. Out-Of-Province applications submitted after this date will not be eligible for funding.

All **In-city/in-province/virtual conferences** must be submitted to [pgs@ataloc55.ab.ca](mailto:pgs@ataloc55.ab.ca) **14 days before the end of June** in any traditional school calendar year to allow for processing.

All applications for tuition must be in by **May 20<sup>th</sup>** in any traditional school calendar year.

Applications for either tuition or in-city/in-province/virtual submitted after the above dates will not be eligible for funding during July and August.

18. Individual Subsidies – excluding possible substitute grants:

- a) Virtual conference/workshop may be funded to a maximum of **\$500.00** based on *original* receipts as stipulated by the guidelines. Approved expenses include Conference registration fees and meal receipts.
- b) Attendance at In-City conference/workshop to a maximum of **\$800.00** based on *original* receipts as stipulated by the guidelines. Approved expenses include conference registration fees and meal receipts and parking/transportation.
- c) Attendance at In-Province conference/workshop may be funded to a maximum of **\$1200.00** based on *original* receipts as stipulated by guidelines. Approved expenses include conference registration fees, meals, accommodations, and transportation receipts **(kilometrage will not be paid but original gas receipts are accepted.)**
- d) Out-of-Province conferences will be funded to a maximum of **\$2000.00** based on *original* receipts as stipulated by guidelines. Approved expenses include conference registration fees, meals, accommodation, and transportation receipts. If renting a car, contract must include name of applicant and detailed receipt is required. Acceptable receipts for airfare include: the original return economy airline ticket and boarding pass or other original documentation listing travel dates, times and costs. All receipts must be itemized and dated. Registration, accommodation, and airfare receipts must bear the name of the applicant. If you are splitting expenses with someone, ensure that all names are on the receipts.

Applicants are encouraged to make travel arrangements with the most flexibility to ensure they are protected financially should unanticipated circumstances arise that prevent them from attending the conference.

For expenses incurred in currencies other than Canadian dollars, if proof of payment is not provided (eg. credit card statements) showing exchange rate and amount paid, the Local will utilize an averaged exchange rate.

- e) Meals to a maximum of **\$50.00** CAD per day (in-city/virtual), **\$100.00** CAD per day (in-province) and **\$120.00** CAD per day (out of province) based on original receipts. Alcohol and long-distance phone charges are not eligible for reimbursement.
- f) Active members on leave who have paid the appropriate membership fees, may be funded to a maximum of **\$800.00** from a) or b) or c) or d) above.

- g) Substitute teachers who are active paid ATA members may apply for a subsidy for a workshop/conference or tuition **to a maximum of \$800.00 per granting period.**
- h) One travel day/Overnight accommodations will be an acceptable expense based on:
  - i). If the conference location is over 100 km from the city of Calgary based on the distance in the 'Kilometrage Chart' published by the Alberta Teachers Association.

19. Successful out-of-province applicants will be ineligible to access any portion of the PGS fund (tuition or workshops/conference funding) the following traditional school calendar year.

20. An applicant who has been approved for conference attendance but is unable to attend must inform [pgs@ataloc55.ab.ca](mailto:pgs@ataloc55.ab.ca) in writing prior to that conference. Failure to inform may result in forfeiture of all funding eligibility for 2 years. Applicants are encouraged to make travel arrangements with the most flexibility to ensure they are protected financially should unanticipated circumstances arise that prevent them from attending the conference.

21. Should any application or reimbursement request raise unusual or unique circumstances, the Committee reserves the right to make recommendation to the Superintendent, Personnel Services, or their designate for final approval.

22. If a teacher is denied/refused funding he/she may appeal the decision in writing prior to the next Professional Growth Subsidy meeting and resubmit his/her application to the committee no later than 5 working days prior to the committee meeting. If denied/refused again, the teacher may appeal to the Superintendent, Personnel Services, or designate.

23. All other factors being equal, the principle of first come, first served will be followed and will be based upon the emailed receipt time.

24. Disposition of funds:

\$ 2400.00 per year for Substitute Teachers' Fund

\$ 13,600.00 year for tuition grants

The remainder available will be dispersed as follows:

30% - Segment 1 – September to November inclusive

30% - Segment 2 – December to February inclusive

30% - Segment 3 – March – May inclusive

10% - Segment 4 – June – August inclusive

Any unused amounts in a segment will be made available in the next segment.

25. TUITION FEES

1. Individuals, under contract and active paid members of the Alberta Teachers' Association, are entitled to make application to attend one course per traditional school calendar year (September 1 to August 31) in the category of tuition fees to a maximum of **\$800.00** per year provided they have not received any in city/in province/virtual/out-of-province conference funding during the current traditional calendar school year (September through August).

Applicants receiving an out-of-province grant are ineligible to receive **any** additional PGS grant (tuition or workshop/conference) funding for the traditional calendar year following the year that they received out-of-province funding.

2. Tuition Reimbursement Form must be completed with all necessary enclosures and signatures.

3. Applications must be submitted via email to [pgs@ataloc55.ab.ca](mailto:pgs@ataloc55.ab.ca) by the 20th of the month **prior** to the commencement of the course to ensure adequate time for processing. Applications received on or after the course commencement date will not be considered.
4. Applicants will receive written approval or refusal of their application.
5. To allow for a diversity of professional development activities, applicants will not be restricted to university-accredited courses only. Courses offered by the universities (non-credited), Continuing Education, Further Education, City of Calgary, etc. will also be considered. This consideration will be given only if the applicant can provide a reasonable detailed rationale of how a course will allow for the professional development of the applicant.
6. Reimbursements will be restricted to actual tuition fees (which does not cover supplies, books or technology) to a maximum of **\$800.00**. Upon the completion of the course, applicants must submit the Tuition Reimbursement form along with proof of completion of the course to [pgs@ataloc55.ab.ca](mailto:pgs@ataloc55.ab.ca). Funds cannot be reimbursed until these documents/forms have been submitted. The course must be completed within the traditional school calendar year (September 1 to August 31).
7. An applicant who has been approved for a course but is unable to attend must inform the Professional Growth Committee via email to [pgs@ataloc55.ab.ca](mailto:pgs@ataloc55.ab.ca) in writing one week before course commencement. Failure to inform the committee via email will result in forfeiture of all funding eligibility for 2 years from the date of notification of forfeiture.
8. If an applicant approved for subsidy for Tuition, finds that the course is unsuitable, may withdraw from that course and re-register in the same faculty, instruction, and semester. The committee must be informed by email to [pgs@ataloc55.ab.ca](mailto:pgs@ataloc55.ab.ca) of the course change within 2 weeks of the original course commencement date. Applicant must provide documentation of course cancellation and registration for the new course. Failure to inform the Committee via email may result in forfeiture of all funding eligibility for 2 years.
9. No substitute/guest teacher release time will be granted to attend a course.
10. Should any application arise involving unusual or unique circumstances, the Committee reserves the right to make recommendations to the Superintendent, Personnel Services or designate for final approval.
11. The committee can only offer financial support when the teacher is under contract and have an active paid membership to the Alberta Teachers Association at the time of application and at the date of course completion.

## 26. IRREGULARITIES IN USE OF FUND

1. Irregularity is identified.
2. Within 30 school days of the identification of the irregularity the teacher will be notified in writing concerning the issue.
  - a) Copies of all documents related to the issue will be sent to the teacher and a request for clarification/explanation will be made in writing.
  - b) A response will be requested within 30 school days. The teacher may submit written clarification to the committee or may appear in front of committee to present clarification or may have a representative make a presentation.
3. If the committee determines that the issue is resolved, a letter will be sent to the teacher indicating the resolution.
4. If the committee determines that the irregularity remains an issue a written declaration will be so issued, inviting a response.
  - a) If no response is received within 15 school days, the committee will inform the teacher that procedures 5 through 6 will occur.
  - b) If a response is received, steps 3 and 4 may be repeated.
5. A 15-day waiting period will occur following the writing of the declaration in item 4 a) The teacher may issue an appeal of the committee's decision to the table officers of the Local. If such an appeal is presented within this time period, the process will be held in abeyance until Table Officers reach a decision and inform the committee of their conclusion. If a difference exists between both groups, a request for assistance will be made to the Members Services Department of the Association.
6. If no appeal is forthcoming within the time period or if the conclusion of Table Officers is consistent with the committee's decision, the committee will:
  - a) formally request a refund, and
  - b) block access to the PGS fund for 5 years, and
  - c) request a professional investigation by the Executive Secretary of the Association.

### Examples of possible irregularities

- A sub day used while not attending a conference.
- Issuing false receipts.